

# Sales and Distribution (SD)

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

## Product

S/4HANA 1809  
Global Bike

GUI 7.50

## Level

Beginner

## Focus

Sales and Distribution

## Authors

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## Version

3.3

## Last Update

May 2019

## MOTIVATION

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

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

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

## PREREQUISITES

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

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

## NOTES

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

Process Overview

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

**Time** 120 min

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

**Employees involved** David Lopez (East Rep. Miami)

Maria Diaz (Sales Person 1)

Matthias Dosch (Sales Person 2)

Sandeep Das (Warehouse Supervisor)

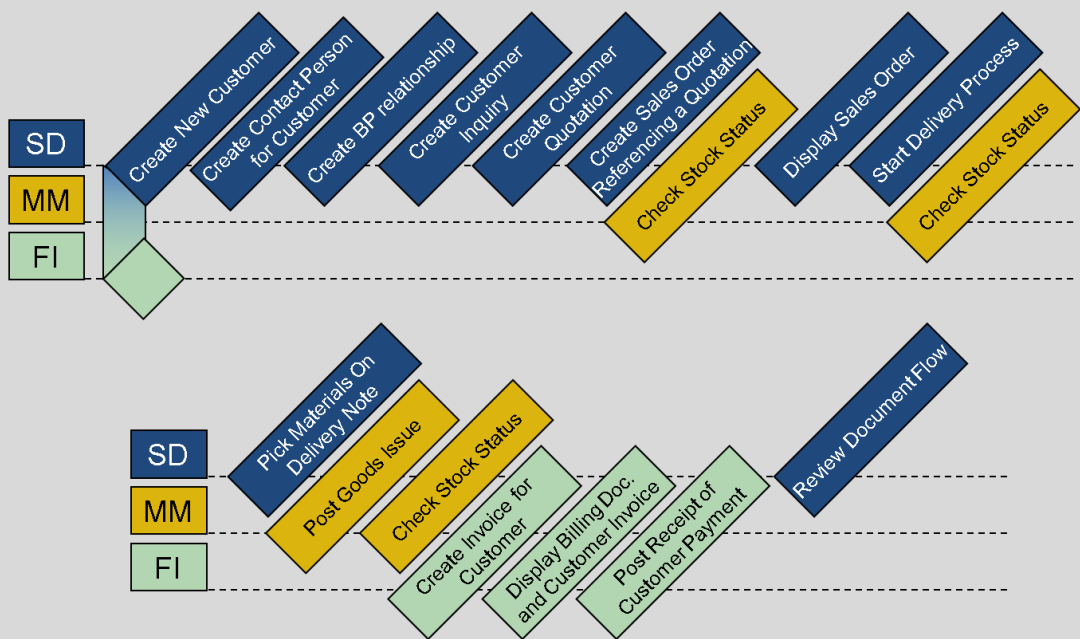
Sergey Petrov (Warehouse Employee)

Stephanie Bernard (Billing Clerk)

Jamie Shamblin (Cost Accountant)

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

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



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## Step 1: Create New Customer

**Task** Create a new customer.

**Time** 10 min

**Short Description** Use the SAP Easy Access Menu to create a new customer.

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

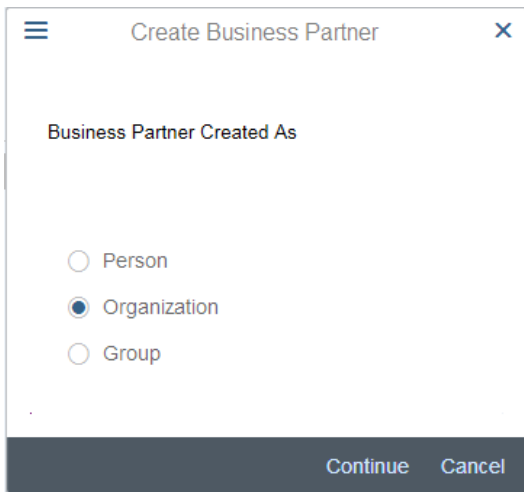
In this case study, we will create the master data for a new customer. Two types of customer data are stored about a customer – sales data and accounting data. The customer master data is created in three groups, or views – general, accounting, and sales. Customers can be created centrally, meaning that all views are generated concurrently, or responsibility can be distributed so that different personnel in the accounting and sales areas are responsible for creating and maintaining the data in their respective views. For this exercise, central creation will be used to enter all of the needed data to define a new customer.

To create a new customer, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Master Data ▶ Business Partner ▶ Customer ▶ Create ▶ Complete**

Menu path

This will produce the following screen.



In the *Create Business Partner* screen choose **Organization**. Press enter.


Organization

In the *Create Organization: Role FI Customer* screen make sure, that for the field *Create in BP role*: **FI Customer (New)** is selected. Enter **Company** for Title, **The Bike Zone** for Name and your number (###) for Search Term. Further, enter **2144 N Orange Ave** for Street, **32804** for Postal Code, **Orlando** for City, **US** for Country and **FL** for Region.

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

Select **English** for Language.


English

Then click on  in the area Standard Address to see additional address options.

Street Address

Street/House number: 2144 N Orange Ave

\* Postal Code/City: 32804 Orlando

\* Country: US Region: FL 

Use the F4-help in the field *Transportation Zone* and choose **Region East** with a double click.

Region East

Transportation zone to or from which the goods are delivered (1)

> Restrictions

Country Key	TranspZone	Description
US	000000001	Region East
US	000000002	Region West

2 Entries found

Then click on **Company Code**. Enter **US00** for Company Code and confirm with Enter.

US00

**Note** Depending on the width of your SAP GUI window you might not be able to see Company Code. In this case you can either look under **More ▶ Company Code** or press Ctrl + F2.

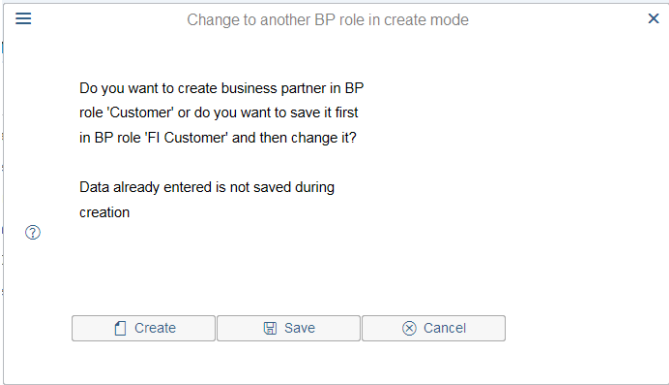
In the tab *Customer: Account Management* enter **110000** for Reconciliation acct. and **001** for Sort key.

110000  
001

Then click on the tab *Customer: Payment Transactions* and enter **0001** for Payment terms. Confirm with Enter.

0001

In the drop down menu behind Create in BP role, choose **Customer**. In the pop-up screen click on .



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

UE00  
WH  
BI

Business Partner: 48029 The Bike Zone / C

\* Change in BP role: Customer (New) ▼ 🔍

---

Sales Area

Sales Org.: UE00 US East

Distr. Channel: WH Wholesale

Division: BI Bicycles

Make sure that **USD** is entered for Currency and **1** is entered for Cust.pric.proc.  
 Enter **US0003** for Sales District, **01** for Customer Group and **01** for Price Group.

USD  
1  
US0003  
01  
1

Then click on the tab “Shipping”.

Enter **02** for Delivery Priority, **01** for Shipping Conditions, **MI00** for Delivering Plant and **3** for Max.Part.Deliveries.

02  
01  
MI00  
3

Check with the screen below.

Orders Shipping Billing Documents Partner Functions

---

Shipping

Delivery Priority: 2 Normal item

Order Combination:

Delivering Plant: MI00 DC Miami

Shipping Conditions: 01 Standard

POD-Relevant:

POD Timeframe:

---

Partial Deliveries

Complete Delivery:

Max.Part.Deliveries: 3

Part.dlv./item:  Partial delivery allowed

Unlimited Tolerance:

Underdel. Tolerance:

Overdeliv. Tolerance:

FOB  
Miami  
0001  
01  
0

Navigate to the tab Billing and enter **FOB** for Incoterms and **Miami** for Incoterms Location, **0001** for Payment Terms, **01** for Acct Assmt Grp Cust. and **0** for all three Tax classific.

Check with the screen below.

Delivery and Payment Terms

Incoterms Version:

Incoterms:

Incoterms Location 1:

Incoterms Location 2:

Payment terms:  Pay immediately w/o deduction

Accounting

Acct Assmt Grp Cust.:  Domestic Revenues

Output Tax

Coun...	Name	Tax categ...	Name	Tax c...	Description
US	USA	UTX1	Tax Jurisdict.Code	0	Exempt
US	USA	UTX2	County Sales Tax	0	Exempt
US	USA	UTX3	City Sales Tax	0	Exempt

Click on  to save your new customer data. The SAP-System creates a unique customer number.

Click on  to return to the SAP Easy Access screen.





## Step 2: Create Contact Person for Customer

**Task** Create a contact person for a customer.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to create a contact person.

**Name (Position)** Maria Diaz (Sales Person 1)

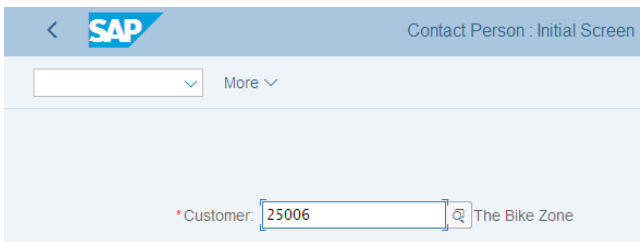
Now that we have created the master data for our new customer, **The Bike Zone**, we can create the master data for a contact person. A contact person is an employee/representative of the new customer's company. The contact person defines a specific person to communicate with when dealing with The Bike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

To create a contact person, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Master Data ▶ Business Partner ▶ Contact Person ▶ Create**

Menu path

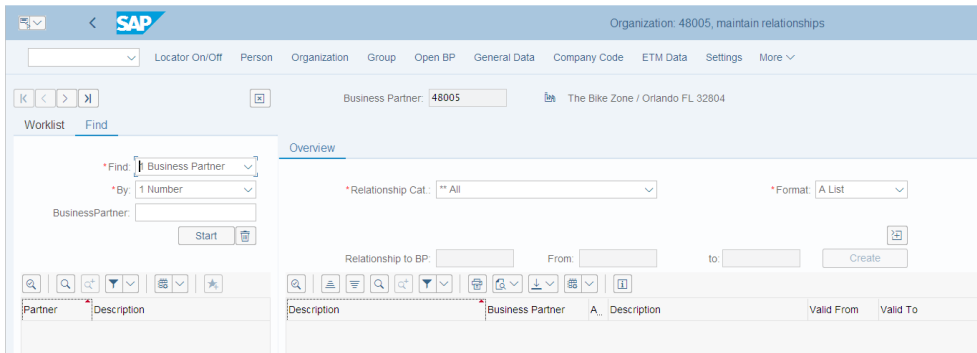
This will produce the following screen.



If your customer number is not entered by default, then search for your new customer using the F4 help with search term ###.

###

When your customer number is entered, click on Enter which will produce the following screen.



Click on the button **Person** to create a new person.

Choose “Contact Person” in the drop-down menu next to *Create in BP role*. In the new pop-up screen *Change to another BP role in create mode* click on



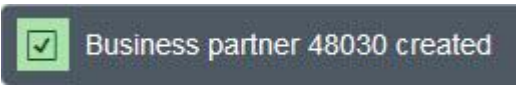
Enter a **Title**, **first name** and **last name** of your choice. Further enter **EN** for Correspondence lang. and **US** for country.


Check with the screen below and click on  .

Title  
First name  
Last name  
EN  
US

The screenshot shows the SAP Business Partner creation interface. At the top, there are fields for 'Business Partner' and 'Grouping' (set to 'Internal number assignment'). Below this is a dropdown menu for '\* Create in BP role:' with 'Contact Person (New)' selected. A navigation bar contains tabs for 'Address', 'Address Overview', 'Identification', 'Control', 'Payment Transactions', and 'Status'. The 'Name' section includes a 'Title' dropdown (set to 'Ms.'), 'First Name' (Susan), and 'Last Name' (Smith) fields. Below these is a '\* Correspondence lang.' dropdown set to 'EN' (English). The 'Search Terms' section has a 'Search Term 1/2:' field. The 'Standard Address' section features a 'Print Preview' button. The 'Street Address' section includes fields for 'Street/House number', 'Postal Code/City', 'Country' (set to 'US'), 'Region', and 'Time zone' (set to 'CST').

Your contact person will be given a unique number.



Click on the exit icon  to return to the SAP Easy Access screen.



### Step 3: Create BP relationship

**Task** Create BP relationship.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to create a business partner relationship.

**Name (Position)** Maria Diaz (Sales Person 1)

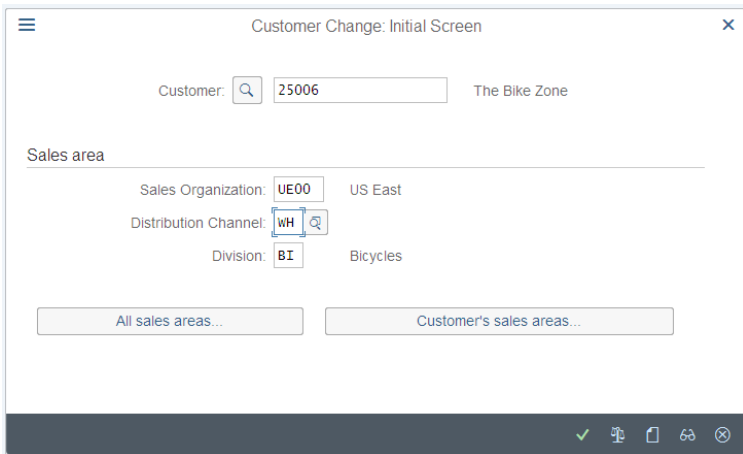
The contact person created for The Bike Zone needs to be assigned as a business partner within the customer master.

To change a customer master record, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Master Data ▶ Business Partner ▶ Customer ▶ Change ▶ Sales and Distribution**

Menu path

This will produce the following screen.



If the customer number is not entered by default, search for it using the F4 help and the search term #### (your number). Make sure that following values are entered: **UE00** for Sales Organization, **WH** is entered for Distribution Channel, and **BI** for Division. Then, press Enter.

UE00  
WH  
BI

Click on **Relationships**.

Make sure that **Has Contact Person** is selected in *Relationship Cat.*



In the field "Relationship to BP" enter the **number of your contact person**. If you do not remember the number, use the F4-help and search for your person's last name in the tab "*Partner by Address*".

Business Partner Number (1)

Partners by address | Partners, General | Partners by BP Role | Russia: Search by misc...

City:

Postal Code:

Street:

House Number:

County:

Township:

Country Key:

Name 1/last name:

Name 2/First name:

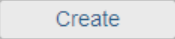
Search term 1:

Search term 2:

Business Partner:

Valid On:

Start Search | Multiple Selection | Close

Choose you contact partner with a double click and then click on  in the screen *Organization: maintain relationships*.

In the next screen, make sure that The Bike Zone is mentioned as your business partner and your contact person is chosen.


Business partner 1:  The Bike Zone / Orlando FL 32804


Relationship Cat.:

Business partner 2:  Judy Smith

Valid From:

Valid To:

Enter **1** for VIP, **0002** for Department and **0002** for Function. Then click on .


Compare with the screen below and save with .

Overview | Has Contact Person (1)

\*Relationship Cat.:

Relationship to BP:  From:  to:

Business Partner	A. Description	Valid From	Valid To
48137	Judy Smith	05/23/2019	12/31/9999

Click on the exit icon  to return to the SAP Easy Access screen.



## Step 4: Create Customer Inquiry

**Task** Create a customer inquiry.

**Time** 10 min

**Short Description** Use the SAP Easy Access Menu to create a customer inquiry.

**Name (Position)** Matthias Dosch (Sales Person 2)

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

To create an inquiry, follow the menu path:

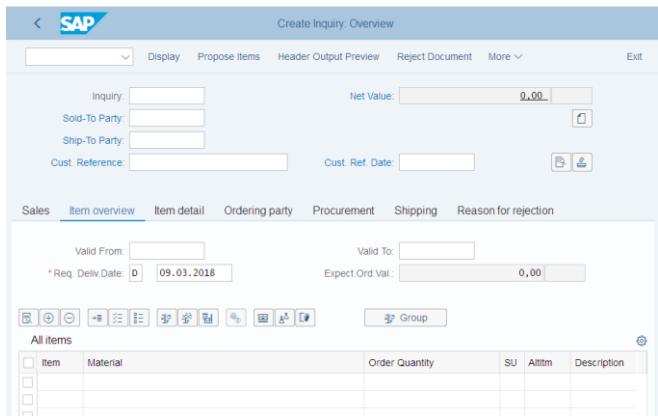
**Logistics ► Sales and Distribution ► Sales ► Inquiry ► Create**


Menu path

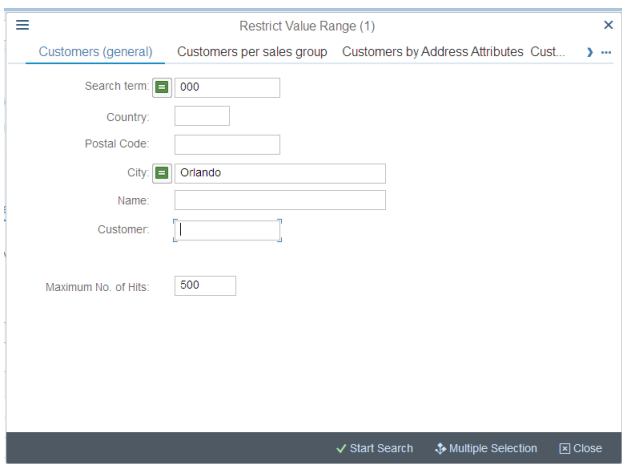
This will produce the following screen.

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

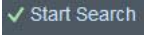
IN  
UE00  
WH  
BI



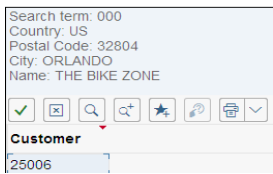
Click on the Sold-to party field, then click on the search icon , which will bring up the following search screen.



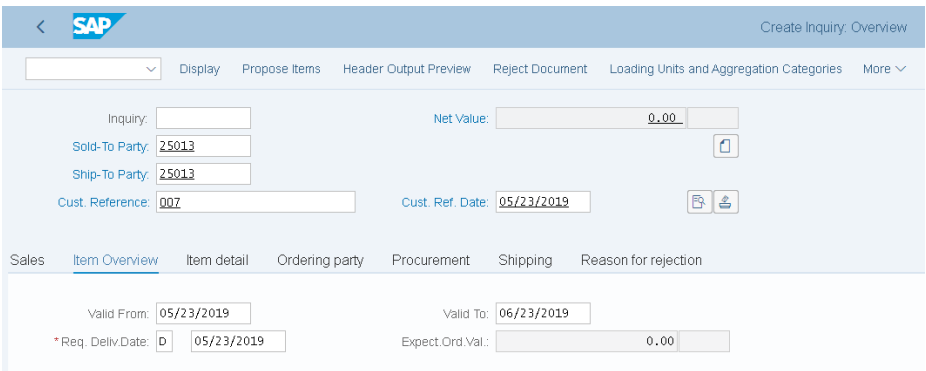
Because you have defined a search term for your new customer, we can now use it to find The Bike Zone.

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

###  
Orlando




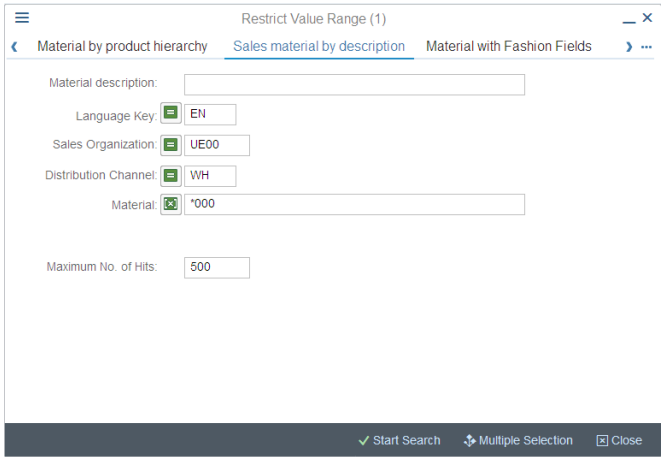
Double-click on The Bike Zone to select it.

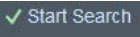


Enter **###** for Cust. Reference, **today's date** for the Customer Ref. Date (F4, then Enter), **today's date** for the Valid from date (F4, then Enter) and a date **one month from today** for the Valid to date (F4, then select the date).

###  
today's date  
one month from today

The Bike Zone wants prices on two products – the Deluxe Touring Bike (black) and the Professional Touring Bike (black). To find these products, we need to use the search function. Click on the material field, then click on the search icon . Make sure you are on the “Sales material by description” tab.



On the Sales material by description tab, enter Sales Organization **UE00**, Distribution Channel **WH** and Material **\*###** (e.g. \*005 if your number is 005). Then click on  to get the list of bicycles.

UE00  
WH  
\*###

Restrict Value Range (1) 19 Entries found

Material by product hierarchv Sales material by description Material with Fashion Fields

Material description	Language	SOrg.	Dchl	Material
AIR PUMP	EN	UE00	WH	PUMP1000
CHAIN LOCK	EN	UE00	WH	CHLK1000
DELUXE TOURING BIKE (BLACK)	EN	UE00	WH	DXTR1000
DELUXE TOURING BIKE (RED)	EN	UE00	WH	DXTR3000
DELUXE TOURING BIKE (SILVER)	EN	UE00	WH	DXTR2000
ELBOW PADS	EN	UE00	WH	EPAD1000
FIRST AID KIT	EN	UE00	WH	FAID1000
KNEE PADS	EN	UE00	WH	KPAD1000
MEN'S OFF ROAD BIKE	EN	UE00	WH	ORMN1000
OFF ROAD HELMET	EN	UE00	WH	OHMT1000
PROFESSIONAL TOURING BIKE (BLACK)	EN	UE00	WH	PRTR1000
PROFESSIONAL TOURING BIKE (RED)	EN	UE00	WH	PRTR3000
PROFESSIONAL TOURING BIKE (SILVER)	EN	UE00	WH	PRTR2000
REPAIR KIT	EN	UE00	WH	RKIT1000
ROAD HELMET	EN	UE00	WH	RHMT1000
T-SHIRT	EN	UE00	WH	SHRT1000
WATER BOTTLE	EN	UE00	WH	BOTL1000
WATER BOTTLE CAGE	EN	UE00	WH	CAGE1000
WOMEN'S OFF ROAD BIKE	EN	UE00	WH	ORWN1000

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

DXTR1###  
5

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

Valid From: 05/23/2019 Valid To: 06/23/2019

\* Req. Deliv.Date: D 05/23/2019 Expect.Ord.Val.: 6,420.00 USD

All Items

Item	Material	Req. Se...	Order Quantity	SU	Altitm	Item Description
<input type="checkbox"/>	10	DXTR1007		5	EA	Deluxe Touring Bike (black)

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

PRTR1###  
2


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

Valid From: 05/23/2019 Valid To: 06/23/2019

\* Req. Deliv.Date: D 05/23/2019 Expect.Ord.Val.: 6,420.00 USD

All Items

Item	Material	Req. Se...	Order Quantity	SU	Altitm	Item Description
<input type="checkbox"/>	10	DXTR1007		5	EA	Deluxe Touring Bike (black)
<input type="checkbox"/>	20	PRTR1007		2	EA	Professional Touring Bike (black)

The total price for these 7 bikes to The Bike Zone is 21,400.00, which is given by the net value. The Expect.ord.val (6,420.00) is a calculated value, which takes the net value of the order and multiplies it by the probability of having an inquiry from this customer turn into an actual order. Select both items and choose . There choose the tab *Sales A*.



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

Order Quantity and Delivery Date

Order Quantity:  EA  EA <->  EA

First Delivery Date:   Requirement Segment

General Sales Data

Net Value:  USD Exch. Rate:

Pricing Date:

Material Entered:

EAN/UPC:  Preference:



Engineering Change:  BOM explosion number:

Usage:

Reason for Rejection:

Order Probability:  Alternative to Item:

The order probability of 30% is the default value that was set for GBI for inquiry documents. The expected order value is then  $0.30 \times 21,400.00 = 6,420.00$ . We can change the order probability for an inquiry, which makes sense, as different customer inquiries would have different probabilities of becoming an actual sales order.



























Change the Order Probabilities to **70%**  , then choose  to get to PRTR1###. There change again the Order Probabilities to **70%**.  to update the inquiry and note the new Expect.ord.val of 14,980.00.

70

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



Valid From:  Valid To:


\* Req. Deliv.Date:   Expect.Ord.Val.:  USD

All items

<input type="checkbox"/>	Item	Material	Order Quantity	SU	Altitm	Description
<input type="checkbox"/>	10	DXTR1000		5	EA	Deluxe Touring Bike (black)
<input type="checkbox"/>	20	PRTR1000		2	EA	Professional Touring Bike (black)

Furthermore, you can check the availability of your material. Therefore, select your item    and click on . Choose  to go back to the overview screen.

Material:  

Deluxe Touring Bike (black)

Plant:  Avail. check:  Check.rule:

MRP Area:  With reqmts qtys:

End lead time:

Base Unit:


Totals display


Receipts:

Issues:  Confmrd issues:

ATP situation

<input type="checkbox"/>	Date	MRP el...	MRP element data	Rec./reqd qty	Confirmed
<input type="checkbox"/>	09.03.2018	Stock	<input type="text"/>	100	
<input type="checkbox"/>	09.03.2018	SLocSt	FG00	100	

Click on  to save the inquiry. The SAP system will assign a unique number to the inquiry.

Click on the exit icon  to return to the SAP Easy Access screen.



## Step 5: Create Customer Quotation

**Task** Create a customer quotation.

**Time** 10 min

**Short Description** Use the SAP Easy Access Menu to create a customer quotation.

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

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

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

**Logistics ▶ Sales and Distribution ▶ Sales ▶ Quotation ▶ Create**


Menu path

This will produce the following screen.

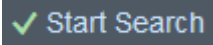
Enter **QT** for Quotation Type, then click on **Create with Reference**. This will produce the following screen.

QT

The screenshot shows a dialog box titled "Create with Reference" with a close button (X) in the top right corner. Below the title bar, there are several tabs: "Inquiry", "Quotation", "Order", "Contract", "SchedAgree", and "BillDoc". The "Inquiry" tab is currently selected. The main area contains the following fields:  
- "Inquiry:" followed by a text input field.  
- "Requested Deliv. Date:" followed by a date selection field.  
- A section titled "Search Criteria" containing:  
 - "Pur. Order:" followed by a text input field.  
 - "Sold-to party:" followed by a text input field.  
 - "WBS Element:" followed by a text input field.  
At the bottom left of the main area is a button with a magnifying glass icon and the text "Search". At the bottom right of the dialog box, there is a dark bar containing three buttons: "Copy", "Item Selection", and "Cancel".

Make sure the *Inquiry* tab is selected, click on the Inquiry field, then on the search icon . This will produce the following search window.

The screenshot shows a search window titled "Sales Document (1)" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Sales document according to customer PO number" (selected) and "Sales documents, not fully confirmed". The main area contains the following fields:  
- "Purchase Order No.:" followed by a text input field containing "000".  
- "Sales Organization:" followed by a text input field containing "UE00".  
- "Sold-to party:" followed by a text input field.  
- "Distribution Channel:" followed by a text input field.  
- "Division:" followed by a text input field.  
- "Sales office:" followed by a text input field.  
- "Sales group:" followed by a text input field.  
- "Created by:" followed by a text input field.  
- "Sales document type:" followed by a text input field.  
- "Customer Ref. Date:" followed by a date selection field.  
- "Transaction group:" followed by a text input field containing "1".  
- "SD Document:" followed by a text input field.  
- "Item (SD):" followed by a text input field.  
- "Maximum No. of Hits:" followed by a text input field containing "500".  
At the bottom of the window, there is a dark bar containing three buttons: "Start Search" (highlighted in green), "Multiple Selection", and "Close".

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

###

Sales Document (1) 1 Entry found

Sales document according to customer PO number Sales documents, not fully confirmed

Purchase Order No.	SOrg.	Sold-To	DChl	Dv	SOff.	SGrp	Created by	SaTy	CustRefDat	TrG	Document	Item
007	UE00	25013	WH	BI		LEARN-007	IN		05/23/2019	1	10000001	000000

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

Create with Reference

Inquiry Quotation Order Contract SchedAgree BillDoc

Inquiry: 10000000

Requested Deliv Date:

Search Criteria

Pur. Order:

Sold-to party:

WBS Element:

Search

Copy Item Selection Cancel

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

Create Quotation: Overview

Quotation:  Net Value: 21,400.00 USD

Sold-To Party: 25006 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804

Ship-To Party: 25006 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804

Cust. Reference:  Cust. Ref. Date:

Valid From: 09.03.2018 Valid To:

\* Req. Deliv Date: D 09.03.2018 Expect. Ord. Val.: 14,980.00 USD

Item	Material	Order Quantity	SU	AltItm	Description
<input type="checkbox"/>	10 DXTR1000		5	EA	Deluxe Touring Bike (black)
<input type="checkbox"/>	20 PRTR1000		2	EA	Professional Touring Bike (black)

Enter ### as Cust. Reference again, today's date for the Cust. Ref. Date, a date one month from today for the Valid to date, and a date one month from today

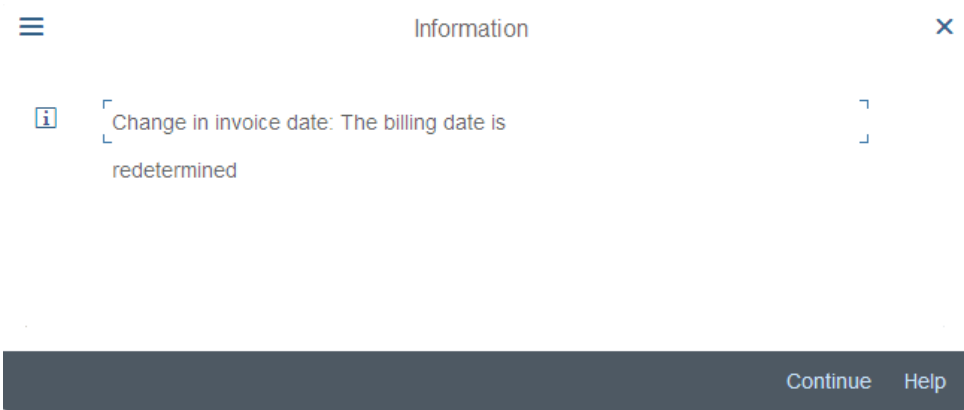
###  
today's date  
one month from today  
one month from today

for the Req. Deliv.Date. Then click Enter, which will produce the following warning.



Press Enter to confirm the warning message.

This will produce an information message.



Click on the enter icon **Continue** to acknowledge this information.

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

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

Pricing Elements										
<input type="checkbox"/>	L...	CnTy	Description	Amount	Crcy	per	U...	Condition Value	Curr.	s
<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"/>			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 checked="" type="checkbox"/>		SKTO	Cash Discount	0,000	%			0,00	USD	
<input checked="" type="checkbox"/>		VPRS	Internal price	1.400,00	USD	1	EA	7.000,00	USD	
<input type="checkbox"/>			Standard - USA /With	1.600,00	USD	1	EA	8.000,00	USD	

In SAP, pricing is done using conditions. The pricing procedure defines which condition types are to be used to calculate the final price. Condition type PR00 is a gross price condition. To add a discount, we can add condition type **K004** (material discount) with an amount of **50** to the pricing procedure.

K004  
50


Pricing Elements

I...	CnTy	Description	Amount
<input type="checkbox"/>	PR00	Price	3.000,00
<input type="checkbox"/>		Gross Value	3.000,00
<input type="checkbox"/>		Discount Amount	0,00
<input type="checkbox"/>		Rebate Basis	3.000,00
<input type="checkbox"/>		Net Value for Item	3.000,00
<input type="checkbox"/>		Net Value 2	3.000,00
<input type="checkbox"/>		Total	3.000,00
<input type="checkbox"/>	SKTO	Cash Discount	0,000
<input type="checkbox"/>	VPRS	Internal price	1.400,00
<input type="checkbox"/>		Standard - USA /With	1.600,00
<input type="checkbox"/>	K004		50

After clicking enter, a new price for the 5 Deluxe Touring bikes will be calculated.

Pricing Elements

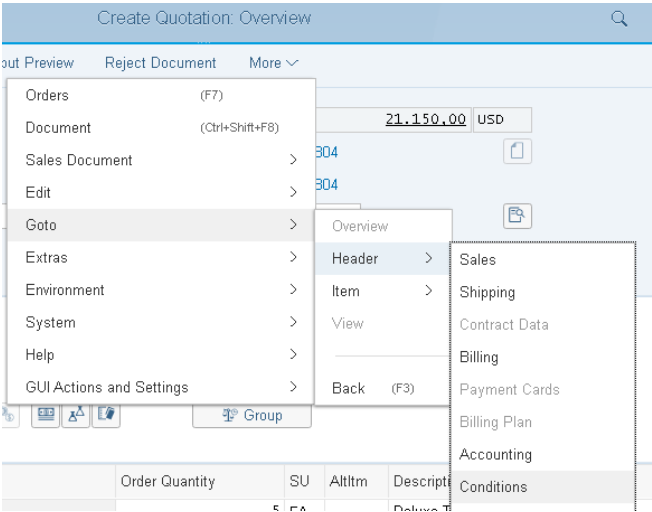
I...	CnTy	Description	Amount	Crcy	per	U...	Condition Value	Curr.
<input type="checkbox"/>	PR00	Price	3.000,00	USD	1	EA	15.000,00	USD
<input type="checkbox"/>		Gross Value	3.000,00	USD	1	EA	15.000,00	USD
<input type="checkbox"/>	K004	Material	50,00-	USD	1	EA	250,00-	USD
<input type="checkbox"/>		Discount 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	1.550,00	USD	1	EA	7.750,00	USD

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

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

**More ▶ Goto ▶ Header ▶ Conditions**

This will produce the following screen.



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

Pricing Elements

<input type="checkbox"/>	I...	CnTy	Description	Amount	Crcy	per	U...	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"/>		SKT0	Cash Discount					0,00	USD
<input type="checkbox"/>		VPRS	Internal price					10.000,00	USD
<input type="checkbox"/>			Standard - USA /With					11.150,00	USD



To include the 5% discount, click on the activate icon

Pricing Elements

<input type="checkbox"/>	I...	CnTy	Description	Amount	Crcy	per	U...	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-	%			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"/>		SKT0	Cash Discount					0,00	USD
<input type="checkbox"/>		VPRS	Internal price					10.000,00	USD
<input type="checkbox"/>			Standard - USA /With					10.092,50	USD

The 5% discount is now applied. Note that it is applied to the price after the \$50 discount per Deluxe Touring bike. Click on **Save** to save the new quotation.

Click on the exit icon **Exit** to return to the SAP Easy Access screen.





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 Easy Access Menu to create a sales order.

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

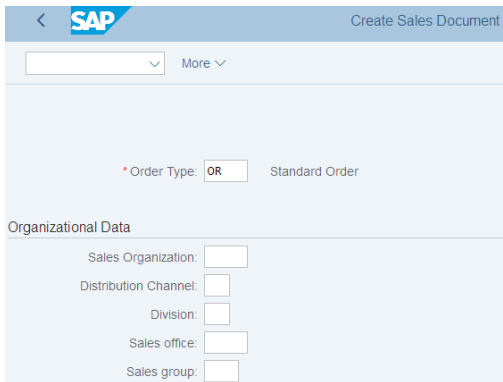
The Bike Zone has agreed to the terms and conditions in the quotation and wants to order the bikes in the quotation. As a result, we can simplify the order creation process by copying the quotation into a sales order.

To create a sales order, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Sales ▶ Order ▶ Create**

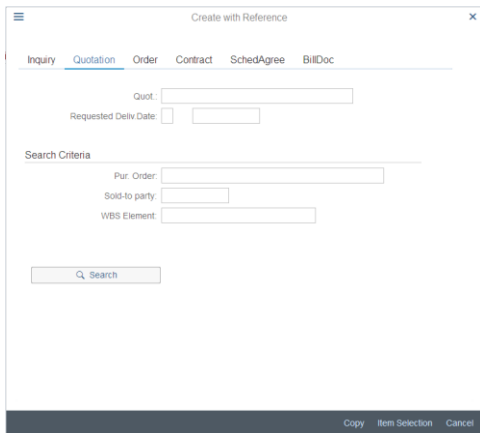
Menu path


This will produce the following screen.



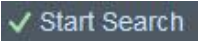
Enter Order Type **OR**. The other fields do not necessarily need to be filled. Then, click on the Create with Reference icon. This will produce the following pop-up search window.

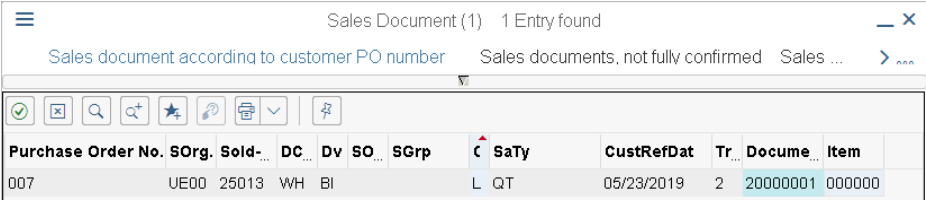
OR



Make sure that the Quotation tab is selected, click on the Quotation field, then on the search icon .


###

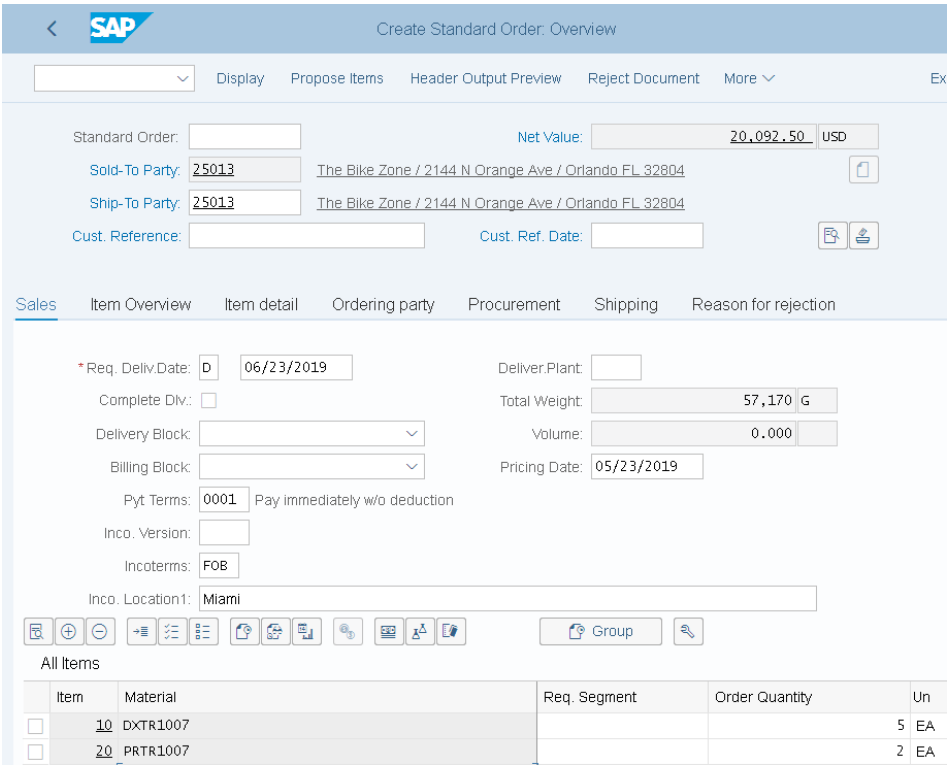
On the following search window, make sure you select the *Sales document according to customer PO number* tab, enter ### for PO number, then click on the enter icon 



Purchase Order No.	SOrg.	Sold...	DC.	Dv	SO...	SGrp	C SaTy	CustRefDat	Tr...	Docume...	Item
007	UE00	25013	WH	BI			L QT	05/23/2019	2	20000001	000000

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

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



Standard Order:  Net Value: 20,092.50 USD

Sold-To Party: 25013 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804

Ship-To Party: 25013 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804

Cust. Reference:  Cust. Ref. Date:

Req. Deliv. Date: D 06/23/2019 Deliver. Plant:

Complete Div.:  Total Weight: 57,170 G

Delivery Block:  Volume: 0.000

Billing Block:  Pricing Date: 05/23/2019


Pyt Terms: 0001 Pay immediately w/o deduction

Inco. Version:

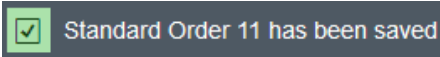
Incoterms: FOB


Inco. Location1: Miami

Item	Material	Req. Segment	Order Quantity	Un
<input type="checkbox"/>	10 DXTR1007			5 EA
<input type="checkbox"/>	20 PRTR1007			2 EA

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

###  
today's date



Click on the exit icon  to return to the SAP Easy Access screen.

## Step 7: Check Stock Status

**Task** Check the inventory.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to check the stock status.

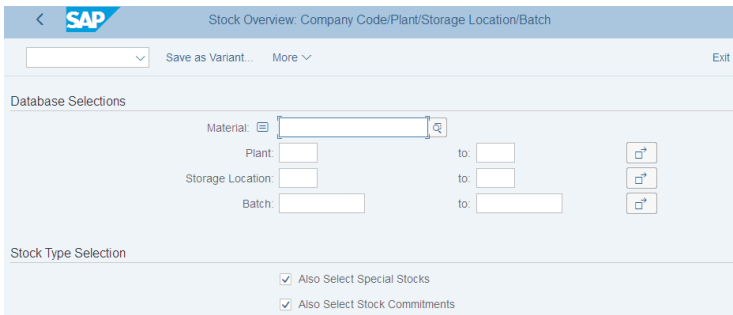
**Name (Position)** David Lopez (East Rep. Miami)


We can check on the inventory level of the bikes in the sales order for The Bike Zone. To do this, follow the menu path:


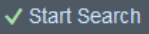
Menu path

**Logistics ▶ Materials Management ▶ Inventory Management ▶ Environment ▶ Stock ▶ Stock Overview**

This will produce the following screen.



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

Use the far-right icon  to select the tab *Sales Material by Description*. Enter **UE00** for Sales Organization, **WH** for Distribution Channel and Material **\*###** (e.g. \*002 if your number is 002). Then click the enter icon  to find the list of materials.

UE00  
WH  
\*###

The screenshot shows the search results for 'Material Number (1) 19 Entries found'. The results are displayed in a table with columns for 'Material description', 'Language', 'S.Org.', 'D.Chl', and 'Material'. The 'Sales material by description' tab is selected.

Material description	Language	S.Org.	D.Chl	Material
AIR PUMP	EN	UE00	WH	PUMP1000
CHAIN LOCK	EN	UE00	WH	CHLK1000
DELUXE TOURING BIKE (BLACK)	EN	UE00	WH	DXTR1000
DELUXE TOURING BIKE (RED)	EN	UE00	WH	DXTR3000
DELUXE TOURING BIKE (SILVER)	EN	UE00	WH	DXTR2000
ELBOW PADS	EN	UE00	WH	EPAD1000
FIRST AID KIT	EN	UE00	WH	FAID1000
KNEE PADS	EN	UE00	WH	KPAD1000
MEN'S OFF ROAD BIKE	EN	UE00	WH	ORMN1000
OFF ROAD HELMET	EN	UE00	WH	OHMT1000
PROFESSIONAL TOURING BIKE (BLACK)	EN	UE00	WH	PRTR1000
PROFESSIONAL TOURING BIKE (RED)	EN	UE00	WH	PRTR3000
PROFESSIONAL TOURING BIKE (SILVER)	EN	UE00	WH	PRTR2000
REPAIR KIT	EN	UE00	WH	RKIT1000
ROAD HELMET	EN	UE00	WH	RHMT1000
T-SHIRT	EN	UE00	WH	SHRT1000
WATER BOTTLE	EN	UE00	WH	BOTL1000
WATER BOTTLE CAGE	EN	UE00	WH	CAGE1000
WOMEN'S OFF ROAD BIKE	EN	UE00	WH	ORWN1000

Double-click on the Deluxe Touring Bike (black) to select it.

With the material number entered from the search list, enter **MI00** for Plant. Then click on **Execute** to look at the stock level.

This report gives stock levels for the DC in Miami.

You can get more detail on the stock of black Deluxe Touring bikes. Select the Miami DC, then click on **Detailed Display**. This will give you very specific information about the inventory of black Deluxe Touring bikes.

Stock Type	Stock
Unrestricted use	100.000
Qual. inspection	0.000
Returns	0.000
On-Order Stock	0.000
Consgt ordered	0.000
Reserved	0.000
Stck trans. (plrit)	0.000
Transfer (SLoc)	0.000
Consgt unrestr.	0.000
Consgt qual. insp.	0.000
GR Blocked Stock	0.000
Cust. inquiries	0.000
Cust. quotations	0.000
Sales orders	5.000
Cust.sched.agmts	0.000
Cust. contracts	0.000
Deliv. w/o charge	0.000
Schd.for delivery	0.000
Rcpt reservation	0.000
RetPckgCust unres	0.000
Empties cust. QI	0.000

Note the 5 bikes that are part of the sales order. Click on the enter icon to close the Detailed Display window, then click on the back icon to return to the main screen.

Use the search function to enter the material number for the Professional Touring bike (black). Click on the execute icon **Execute** and review the stock level for this bike.

Click on the exit icon **Exit** to return to the SAP Easy Access screen.





## Step 8: Display Sales Order

**Task** Display a sales order.

**Time** 10 min

**Short Description** Use the SAP Easy Access Menu to display a sales order.

**Name (Position)** Sandeep Das (Warehouse Supervisor)

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

To display a sales order, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Sales ▶ Order ▶ Display**

Menu path

This will produce the following screen.

To make sure you have the correct sales order number, use the search function to find it. Click on the order field, then click on the search icon . This will bring up the search pop-up window.


After entering your PO number ###, click on **Start Search** to get a list of sales orders.

###

Purchase Order No.	SOrg.	Sold-To	DChl	Dv	SOff.	SGrp	C	SaTy	CustRefDat	TrG	Document	Item
007	UE00	25013	WH	BI		L	OR	05/23/2019	0	17	000000	

After double-clicking on your sales order number, click on **Continue** to display the sales order. This will produce the following sales order items.

Item	Material	Order Quantity	Un	S	Description
<input type="checkbox"/>	10 DXTR1000		5	EA	Deluxe Touring Bike (black)
<input type="checkbox"/>	20 PRTR1000		2	EA	Professional Touring Bike (black)

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

Totals display

Receipts:

Issues:  Confirmed issues:

ATP situation

Date	MRP el...	MRP element data	Rec/reqd qty	Confirmed	Cum. ATP qty
<input type="checkbox"/> 05/23/2019	Stock		80		78
<input type="checkbox"/> 05/23/2019	CusOrd	Totals record	2~	2	78
<input type="checkbox"/> 05/23/2019	SLocSt	FG00	80		80

This screen shows that, in this case, there are actually 80 bikes in stock and the order we are displaying will use 2 of these.

**Note** Your numbers may be different. Clicking on the *Scope of check* icon will produce the following pop-up window.

Display Scope of Check

Availability Check:  Individ. requirements

Checking Rule:  SD order

**Stocks**

With Safety Stock

With Stock in Transfer

With Quality Inspection Stock

With Blocked Stock

With Restricted-Use Stock

**Requirements**

With Sales Requirements

With Deliveries

With Stock Transport Reqts:

With Reservations

With Dependent Requirements

With Dependent Reservations:

**Future Supply**

With Purchase Requisitions

With Purchase Orders:

With Shipping Notifications

With Planned Orders:

With Production Orders:

**Replenishment Lead Time**

Without Replenishment Lead Time

**Delayed Supply**

Without Receipts in Past

Show Message for Delayed Supply

**Special Scenarios**

Without Storage Location Check



Without Subcontracting

Missing Parts Processing


Checking Period: Goods Receipt

[Close](#)

This screen displays the elements considered when performing the availability check. For example, Incl. purchase orders is selected, which means that a purchase order will be considered as available stock from its receipt date onward.

Click on the cancel icon  to close the pop-up window, then click on the back icon  to return to the overview screen.

Item	Material	Order Quantity	Un	S	Description	Customer Material Huro	BCA	HLBn	First date	Pint	ConTy	Amount	City
<input type="checkbox"/>	10 DXTR1000	<input type="text" value="80"/>	5	EA	Deluxe Touring Bike (black)		TAN	0	0	09.03.2016	H100	0,00	USD
<input type="checkbox"/>	20 PRTR1000		2	EA	Professional Touring Bike (black)		TAN	0	0	09.03.2016	H100	0,00	USD


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


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

Quantity:  EA Net:  USD Tax:

Pricing Elements

I...	CnTy	Name	Amount	Crcy	per	UoM	Condition Value	Curr.	Status
<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"/>	RA00	% Discount from Net	5.000-	%			737.50-	USD	
<input type="checkbox"/>		Discount Amount	197.50-	USD	1	EA	987.50-	USD	
<input type="checkbox"/>		Rebate Basis	2,802.50	USD	1	EA	14,012.50	USD	
<input type="checkbox"/>		Net Value for Item	2,802.50	USD	1	EA	14,012.50	USD	
<input type="checkbox"/>		Net Value 2	2,802.50	USD	1	EA	14,012.50	USD	
<input type="checkbox"/>		Total	2,802.50	USD	1	EA	14,012.50	USD	
<input type="checkbox"/>	SKT0	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	1,402.50	USD	1	EA	7,012.50	USD	

The details of the price calculation for the Deluxe Touring bike are displayed. Note the two discounts that were manually applied to this line item. Click on the back icon  twice to return to the overview screen.

Click on the exit icon  to return to the SAP Easy Access screen.





## Step 9: Start Delivery Process

**Task** Start the delivery process.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu 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, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Shipping and Transportation ▶ Outbound Delivery ▶ Create ▶ Single Document ▶ With Reference to Sales Order**

Menu path

This will produce the following screen.

The screenshot shows the SAP 'Create Outbound Delivery with Order Reference' screen. At the top, there is a navigation bar with the SAP logo and the title 'Create Outbound Delivery with Order Reference'. Below the navigation bar, there are several tabs: 'W/o Order Reference', 'Overview', and 'More'. The main content area is divided into sections:
 

- \*Shipping Point:** A text input field containing 'MI00'.
- Sales Order Data:** A section containing:
  - Selection Date:** A date input field with '05/30/2019'.
  - \*Order:** A text input field with '17'.
  - From Item:** An empty text input field.
  - To Item:** An empty text input field.
- Predefine Delivery Type:** A section containing:
  - Delivery Type:** An empty text input field.

Enter **MI00** for Shipping Point. Enter a selection date **one week from today** (you can use **F4** to call up the calendar window).

MI00  
one week from today

If the sales order number is not entered automatically, you can search for you sales order number using the Sales documents according to customer PO number tab. Enter your PO number (###).

###

Then click on **Continue**.

All Items

Item	Material	Description	B...	ItCa	Picking Status	Open Qty
<input type="checkbox"/> 10	DXTR100Z	Deluxe Touring Bike (black)		TAN	A	5
<input type="checkbox"/> 20	PSTR100Z	Professional Touring Bike (black)	<input type="checkbox"/>	TAN	A	2

Select the Deluxe Touring bike line, then click on the details icon and choose the Picking tab, which will produce the following screen.

Processing Material Batch Split **Picking** Loading and Shipment Financial Processing Texts

Quantities and weights

Pick quantity: 0 EA  
Div. quantity: 5 EA  
Conversion: 1 EA  
Requirement Segment:   
Gross weight: 42,550 G  
Net weight: 42,550  
Volume:   
Div. qty: 5 EA  
<->: 1 EA  
Over. Tol.: 0.0 %  Unlimited  
Under. Tol.: 0.0 %

Material

Batch:   Batch mgmt  
Trans. Group: 0001 On pallets  
Stor. cond.:  DGProfile:   
Temp. cond.:

Warehouse

Mat. Avail. Date: 05/23/2019 00:00..  
Pick. Stat: A Not Yet Picked  
WM Status:  No WM Trnsf Ord Reqd  
Plant: MI00 DC Miami  
Stor. Loc.:   
Storage Bin:

This screen shows that the order has not yet been picked. After clicking on **Save**, a delivery document will be created with a unique document number

Outbound Delivery 80000021 has been saved

Click on **Exit** to return to the SAP Easy Access screen.



## Step 10: Check Stock Status

**Task** Check the inventory.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to check the stock status.

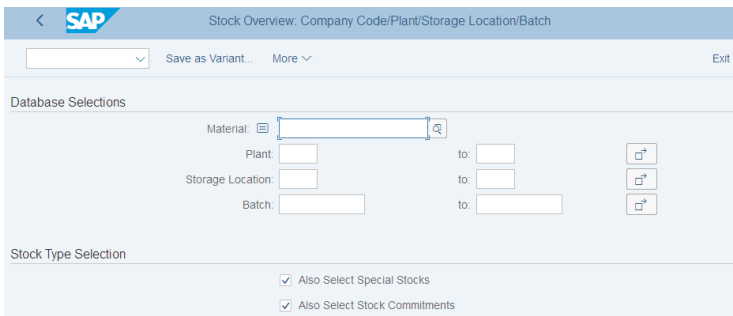
**Name (Position)** Sergey Petrov (Warehouse Employee)


To check on the inventory for the bikes in the sales order for The Bike Zone, follow the menu path:

**Logistics ▶ Materials Management ▶ Inventory Management ▶ Environment ▶ Stock ▶ Stock Overview**

Menu path

This will produce the following screen.



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

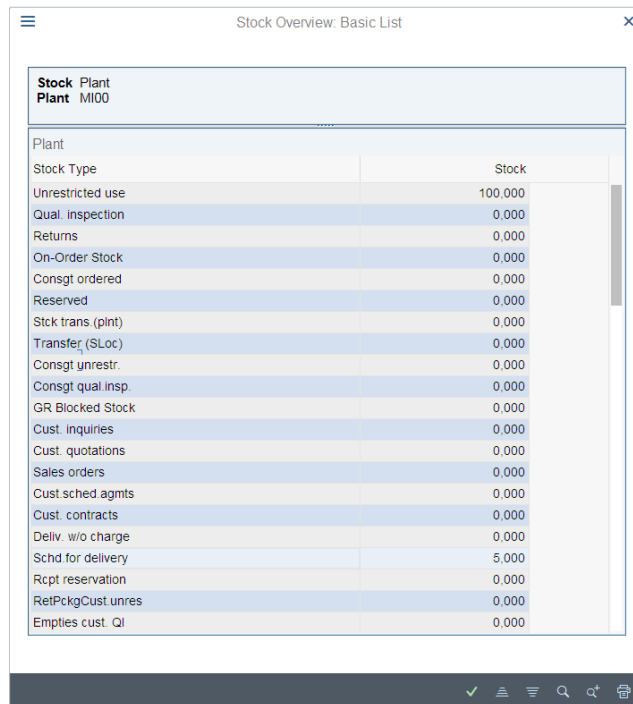
UE00  
WH  
\*###  
MI00

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


Client/Company Code/Plant/Storage Location/Batch/Special Stock	Unrestricted use
Full	100,000
US00 Global Bike Inc.	100,000
MI00 DC Miami	100,000
FG00 Finished Goods	100,000

Select the Miami DC, then click





Stock Type	Stock
Unrestricted use	100,000
Qual. inspection	0,000
Returns	0,000
On-Order Stock	0,000
Consgt ordered	0,000
Reserved	0,000
Stck trans. (pint)	0,000
Transfer (SLoc)	0,000
Consgt unrestr.	0,000
Consgt qual. insp.	0,000
GR Blocked Stock	0,000
Cust. inquiries	0,000
Cust. quotations	0,000
Sales orders	0,000
Cust. sched agmts	0,000
Cust. contracts	0,000
Deliv. w/o charge	0,000
Schd. for delivery	5,000
Rcpt reservation	0,000
RetPckgCust unres	0,000
Empties cust. Ql	0,000

Note that the 5 bikes for The Bike Zone order are now shown as *Schd. for delivery*. Click on the enter icon  to close the Detailed Display window.

Click on [Exit](#) to return to the SAP Easy Access screen.



## Step 11: Pick Materials on Delivery Note

**Task** Pick materials on delivery note.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to pick materials.

**Name (Position)** Sandeep Das (Warehouse Supervisor)

To record the picking of the material, we change the delivery document. To change the delivery document, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Shipping and Transportation ▶ Outbound Delivery ▶ Change ▶ Single Document**

Menu path

This will produce the following screen.

The screenshot shows the SAP 'Change Outbound Delivery' interface. At the top, there is a navigation bar with the SAP logo and the title 'Change Outbound Delivery'. Below the navigation bar, there are several tabs: 'Display <-> Change', 'Document Flow', 'Overview', 'Header Details', 'Pack', 'More', and 'Exit'. The 'Outbound Delivery' field is highlighted and contains the value '80000007'.

If the Outbound Delivery document number is not entered automatically, you can search for your delivery document using the tab Outbound Delivery: Not Posted for Goods Issue (**MI00** for Shipping Point and **your customer number** for Ship-to party).

MI00  
your customer number

After clicking on **Continue**, you will get the following screen.

The screenshot shows the SAP 'Outbound Delivery 80000016 Change: Overview' interface. The title bar includes the SAP logo and the text 'Outbound Delivery 80000016 Change: Overview'. Below the title bar, there are several tabs: 'Display <-> Change', 'Other Outbound Delivery', 'Delete', 'Document Flow', 'Header Details', 'Pack', and 'More'. The 'Outbound Deliv.' field contains '80000016' and the 'Document Date' is '05/23/2019'. The 'Ship-to party' is '25013' and the address is 'The Bike Zone / 2144 N Orange Ave / Orlando FL 32804'. Below this, there are tabs for 'Item Overview', 'Picking', 'Loading', 'Shipment', 'Status Overview', and 'Goods Movement Data'. The 'Planned GI' is '05/23/2019' and '00:00\_'. The 'Actual GI Date' is empty and '00:00'. The 'Total Weight' is '57,170' and 'No. of Packages' is empty. At the bottom, there is a table titled 'All Items' with columns for 'Itm', 'Material', 'Deliv. Qty', 'Un', and 'Description'.

Itm	Material	Deliv. Qty	Un	Description
10	DXTR1007	5	EA	Deluxe Touring Bike (black)
20	PRTR1007	2	EA	Professional Touring Bike (black)

Click on the picking tab, then enter **FG00** for SLoc (storage location) and the appropriate quantity for the picked quantity (**5** for DXTR1### and **2** for

FG00  
5  
2

PRTR1###). Click on **Save** to save the picking information. You should get the following message at the bottom-left corner of the screen.



Click on **Exit** to return to the SAP Easy Access screen.



## Step 12: Post Goods Issue

**Task** Post a goods issue.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to post a goods issue.

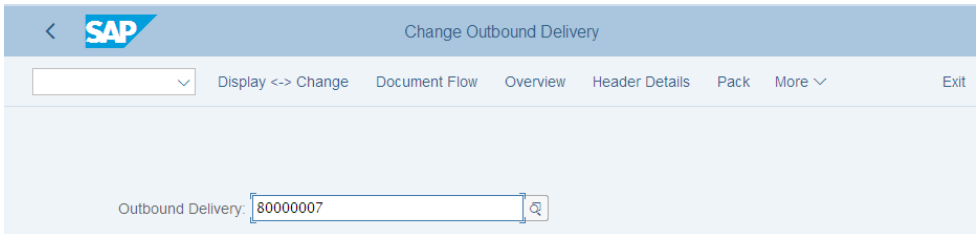
**Name (Position)** Sandeep Das (Warehouse Supervisor)

To post the goods issue (change the possession of the material from GBI to The Bike Zone), follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Shipping and Transportation ▶ Outbound Delivery ▶ Change ▶ Single Document**

Menu path

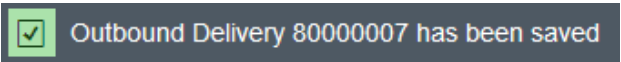
This will produce the following screen.



If the Outbound Delivery document number is not entered automatically, you can search for your delivery document using the tab Outbound Delivery: Not Posted for Goods Issue (**MI00** for Shipping Point and **your customer number** for Ship-to party).

MI00  
your customer number

With the correct delivery document number filled in, click on the Post Goods Issue icon. You should get the following message at the bottom-left corner of the screen.



Click on the exit icon **Exit** to return to the SAP Easy Access screen.



## Step 13: Check Stock Status

**Task** Check the inventory.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to check the stock status.


**Name (Position)** Sandeep Das (Warehouse Supervisor)

To see the impact that the goods issue for the bikes in the sales order for The Bike Zone has on the inventory position of GBI, follow the menu path:

**Logistics ▶ Materials Management ▶ Inventory Management ▶ Environment ▶ Stock ▶ Stock Overview**

Menu path


This will produce the following screen.

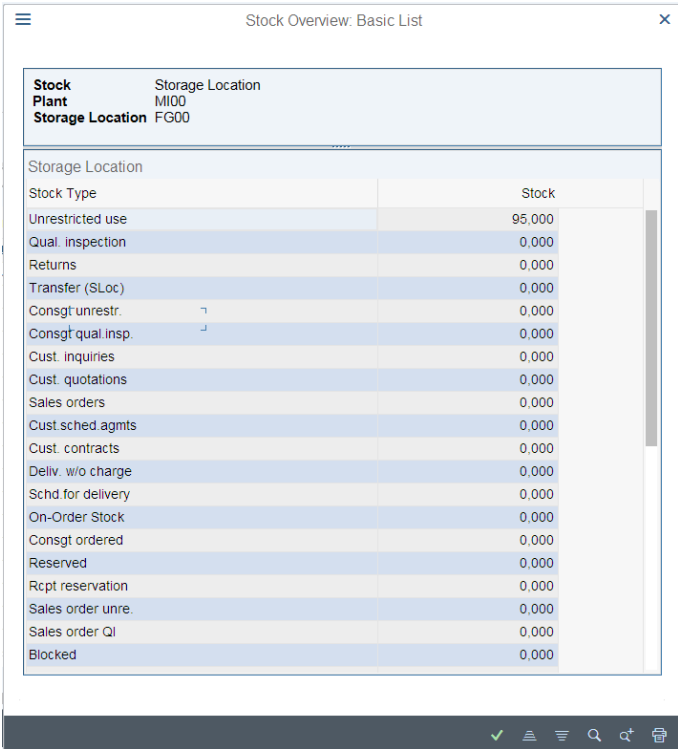
If the Material and Plant fields are not automatically filled in, click on the Material field, then click on the search icon . Use the Sales material by description tab with **UE00** for Sales Organization, **WH** for Distribution Channel and **\*###** for Material. Pick the black Deluxe Touring bike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

UE00  
WH  
\*###  
MI00

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

Client/Company Code/Plant/Storage Location/Batch/Special Stock	Unrestricted use	Qual. inspection	Rese
Full	95,000		
US00 Global Bike Inc.	95,000		
MI00 DC Miami	95,000		
FG00 Finished Goods	95,000		


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




The screenshot shows a window titled "Stock Overview: Basic List" with a close button (X) in the top right corner. The window contains a table with the following data:

Stock Plant	Storage Location	Stock
MI00	FG00	
Storage Location		
Stock Type		Stock
Unrestricted use		95,000
Qual. inspection		0,000
Returns		0,000
Transfer (SLoc)		0,000
Consgt unrestr.		0,000
Consgt qual insp.		0,000
Cust. inquiries		0,000
Cust. quotations		0,000
Sales orders		0,000
Cust.sched agmts		0,000
Cust. contracts		0,000
Deliv. w/o charge		0,000
Schd.for delivery		0,000
On-Order Stock		0,000
Consgt ordered		0,000
Reserved		0,000
Rcpt reservation		0,000
Sales order unre.		0,000
Sales order QI		0,000
Blocked		0,000

At the bottom of the window, there is a toolbar with icons for a checkmark, a list, a search, a refresh, and a print function.

The inventory is reduced from before by the amount that used to appear as *Schd. for delivery*. Click on the enter icon  to close the window.

Click on the exit icon  to return to the SAP Easy Access screen.





## Step 14: Create Invoice for Customer

**Task** Create a billing document for a customer.

**Time** 10 min

**Short Description** Use the SAP Easy Access Menu to create a customer billing document.

**Name (Position)** Stephanie Bernard (Billing Clerk)

With the delivery complete, the customer can be invoiced. To do this, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Billing ▶ Billing Document ▶ Process Billing Due List**

Menu path

This will produce the following screen.

Enter **UE00** for Sales Organization and **your customer number** for Sold-To Party.

UE00  
your customer number

F4  
###  
Orlando

If you do not remember your customer number, find it by using the F4 help in the Sold-To Party field and entering your individual number (###) in the Search term field and **Orlando** in the City field. Confirm with **Start Search**. Then, double-click on the one result row.

Then, click on the **Display Billing List** Display Billing List icon. This will produce the following screen.

<input type="checkbox"/>	S	BICat	SOrg	Billing Date	Sold-To	BillIT	DstC	Document	DChl	Dv	Doc.Cat	Addr...	Sold-To Party	Sold-toLoc
<input checked="" type="checkbox"/>	X	L	UE00	05/23/2019	25013	F2	US	80000016	WH	BI	J	136229	The Bike Zone	Orlando

Select you line item and click on **Individual Billing Document**.

Item	Material	Item Description	Billed Quantity	SU	Net Value	Curre...	Tax Amount	Cost	Pricing Date	Serv. Rendered	Net weight	Gross weight	W...
10	DXTR1007	Deluxe Touring Bike (black)	5	EA	14,032.50	USD	0.00	7,000.00	05/23/2019	05/23/2019	42,550	42,550	G
20	PRTR1007	Professional Touring Bike (black)	2	EA	6,080.00	USD	0.00	3,000.00	05/23/2019	05/23/2019	14,620	14,620	G

Click on the icon **Save** to return to the Maintain Billing Due List screen.



Note that the highlight is turned off on the line, and there is a message at the bottom of the screen.

<input type="checkbox"/>	S	BIC...	SOrg	Billing Date	Sold-to...	BillIT	DstC	Document	DChl	Dv	Doc.Cat	Addr...	Sold-to party	Sold-toLoc	S	Count...	ShPt
<input type="checkbox"/>	1	L	UE00	09.03.2018	25006	F2	US	80000007	WH	BI	J	133614	The Bike Zone	Orlando			MI00

Click on the exit icon **Exit** to return to the SAP Easy Access screen.



## Step 15: Display Billing Document and Customer Invoice

**Task** Display a billing document and a customer invoice.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to display a billing document/customer invoice.

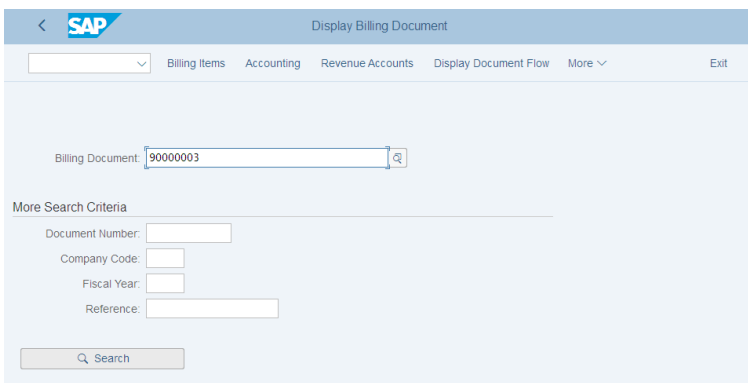
**Name (Position)** Stephanie Bernard (Billing Clerk)

The invoice that will be sent to The Bike Zone can be viewed by following the menu path:

**Logistics ▶ Sales and Distribution ▶ Billing ▶ Billing Document ▶ Display**

Menu path

This will produce the following screen.



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

F4  
Sold-to party number

If you don't know your Sold-to party number, go back to the SAP Easy Access Menu and open the Transaction VD03. Use the F4 Help in the Customer field. In the pop-up enter Orlando as City and \*### as Search term and click on **Start Search**. Write down your Sold-to party number and restart this step.

VD03  
F4  
Orlando  
\*###

To review the accounting implications of this sale, click on the icon **Accounting**. This will produce the following screen.

Display Document: Data Entry View


Change Display/Change Mode Display Another Document More

Data Entry View

Document Number: 90000006 Company Code: US00 Fiscal Year: 2019  
Document Date: 05/23/2019 Posting Date: 05/23/2019 Period: 5  
Reference: 007 Cross-Comp.No.:  
Currency: USD Texts Exist: Ledger Group:

Co...	Item	K...	S	Account	Description	Amount	Curr.	Tx
US00	1	01		25013	The Bike Zone	20,092.50	USD	
	2	50		600001	Sales revenue	15,000.00-	USD	
	3	40		610000	Tax on sls/purch.	250.00	USD	
	4	40		610000	Tax on sls/purch.	737.50	USD	
	5	50		600001	Sales revenue	6,400.00-	USD	
	6	40		610000	Tax on sls/purch.	320.00	USD	

Review the accounting postings due to this sales order.

Click on the exit icon  to return to the SAP Easy Access screen.



## Step 16: Post Receipt of Customer Payment

**Task** Post a customer payment receipt.

**Time** 10 min

**Short Description** Use the SAP Easy Access Menu to post a customer payment receipt.

**Name (Position)** Jamie Shamblin (Cost Accountant)

After The Bike Zone mails its payment, it needs to be recorded. To do this, follow the menu path:

**Accounting** ▶ **Financial Accounting** ▶ **Accounts Receivable** ▶ **Document Entry** ▶ **Incoming Payments**

Menu path

This will produce the following screen.


The screenshot shows the SAP 'Post Incoming Payments: Header Data' screen. The form is organized into several sections:

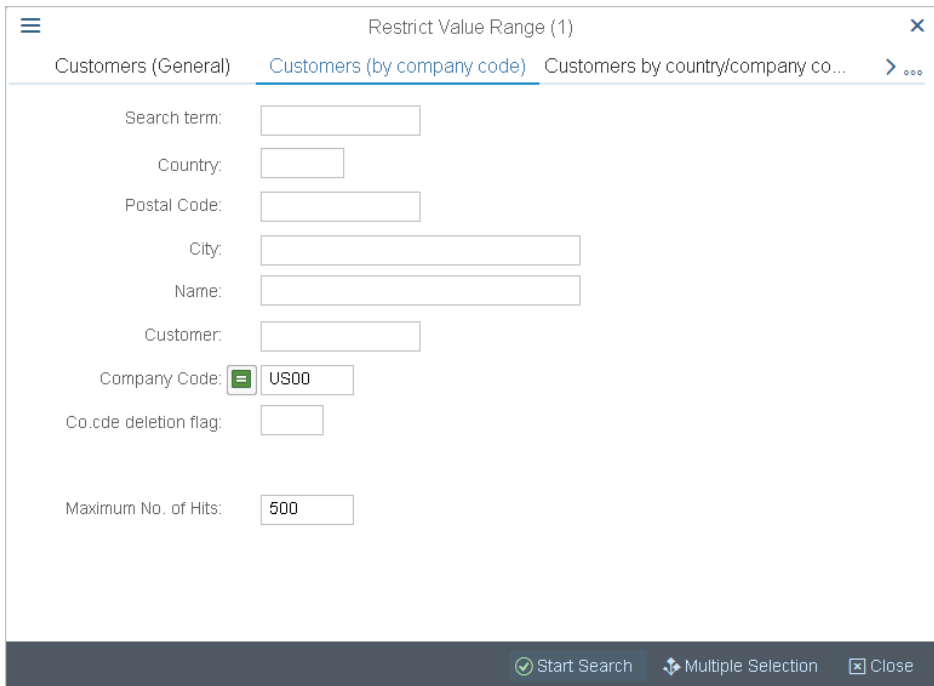
- Header Data:** Includes fields for Document Date (05/23/2019), Type (DZ), Company Code (US00), Currency/Rate (USD), and Amount (100000). Other fields include Posting Date, Period, Document Number, Reference, Doc. Header Text, Clearing Text, Translation date, Cross-CC Number, and Trading part BA.
- Bank data:** Includes fields for Account, Business Area, Amount, Amt. in loc. cur., Bank Charges, Value date (05/23/2019), Text, LC Bank Charges, Profit Center, and Assignment.
- Open item selection:** Includes fields for Account, Account Type (D), Special G/L Ind., and Pay Adv. No. There are checkboxes for 'Distribute by Age' and 'Automatic Search', and a checkbox for 'Standard Ols' which is checked.
- Additional selections:** Includes radio buttons for 'None', 'Amount', 'Document Number', 'Posting Date', 'Dunning Area', and 'Others'. The 'None' option is selected.

A 'Post' button is visible at the bottom right of the form.

Use F4 and Enter to enter the **current date** for the document date. Enter **US00** for Company Code, **USD** for Currency/Rate, **100000** for Account, and **20,092.50** for amount.

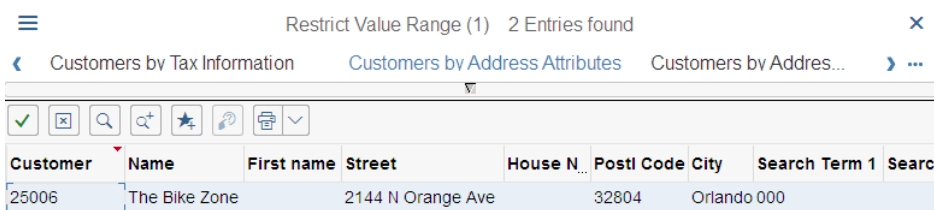
current date  
US00  
USD  
100000  
20.092,50

Under Open item selection, click on the Account field, then the search icon , to get the following search pop-up window.



As The Bike Zone was created with the data set number (###) as a search term, you can use this and the City **Orlando** to find your Bike Zone customer. After entering ### and Orlando on the Customers (by company code) tab, click on **Start Search** and you will get the following results.

###  
Orlando



Customer	Name	First name	Street	House N...	Postl Code	City	Search Term 1	Search Term 2
25006	The Bike Zone		2144 N Orange Ave		32804	Orlando 000		

After double-clicking on Bike Zone to select it, click on the Process Open Items button. You will get the following screen.



Document Nu...	D...	Document Date	P...	Busi...	Day...	USD Gross	CashDiscount	CDPer.
90000006	RV	05/23/2019	01		0	20,092.50		

If the Not assigned field does not show a 0.00 balance, double-click on the **20,092.50** amount to assign the payment to the accounts receivable.

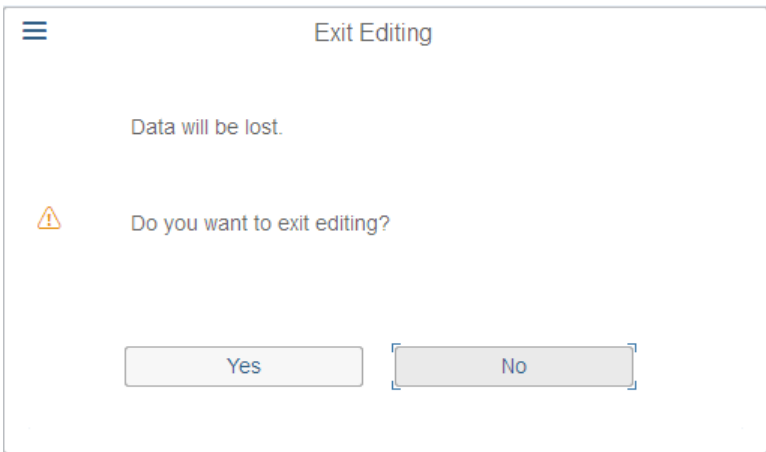
Payment document  
number

Amount Entered:	20,092.50
Assigned:	20,092.50
Difference Postings:	
<b>Not Assigned:</b>	0.00

Then click on **Post** to post the payment. The system will assign a document number automatically.



Click on the exit icon **Exit**, which will produce the following pop-up window.



There is no data to be lost, so click on the **Yes** icon to return to the SAP Easy Access menu.

Yes



## Step 17: Review Document Flow

**Task** Review the document flow.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to review the document flow.

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

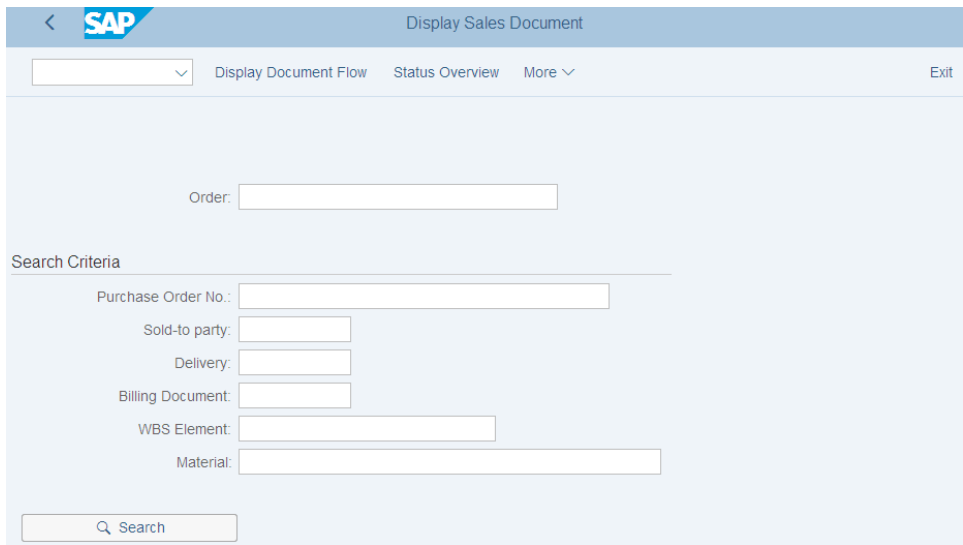
The document flow tool links all documents that were used in The Bike Zone’s sales order. Again, there are many ways to access the document flow tool. One way is to start by displaying the sales order document.

To display the document flow, follow the menu path:

**Logistics ▶ Sales and Distribution ▶ Sales ▶ Order ▶ Display**

Menu path

This will produce the following screen.



If your sales order is not displayed, you can search for you sales order number using the Sales document according to customer PO number tab. Enter your PO number (###).

###

To access the document flow tool, follow the pull-down menu path:

**More ▶ Environment ▶ Display Document Flow**

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



Document	Quantity	Unit	Ref. Value	Currency	On	Time	Status
✓ Inquiry 0010000001 / 10	5	EA	15,000.00	USD	05/23/2019	14:52:11	Completed
✓ Quotation 0020000001 / 10	5	EA	14,012.50	USD	05/23/2019	16:09:08	Completed
✓ → Standard Order 0000000017 / 10	5	EA	14,012.50	USD	05/23/2019	16:37:19	Completed
✓ Outbound Delivery 0080000016 / 10	5	EA			05/23/2019	17:24:00	Completed
✓ Picking Request 20190523 / 10	5	EA			05/23/2019	17:36:18	Completed
✓ GD goods issue: delvy 4900014120 / 1	5	EA	7,000.00	USD	05/23/2019	17:39:37	Complete
✓ Invoice 0090000006 / 10	5	EA	14,012.50	USD	05/23/2019	17:44:52	Completed
✓ Accounting Document 0090000006	5	EA			05/23/2019	17:44:52	Cleared

Review the documents for The Bike Zone’s order. You may select any document and click on **Display Document** to look at it in detail.

Click on the exit icon **Exit** to return to the SAP Easy Access screen.



 SD Challenge

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

**Time** 75 min

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

**Scenario** Your customer has opened a new store *Alster Adventures* and wishes to profit from your new initiative, which promises one free off-road helmet for each mountain bike ordered. A single position can be marked as Free of Charge Item (TANN) within the Item detail view of a standard order. Please note that off-road helmets belong to a different division. Create a new customer *Alster Adventures* by copying from *Alster Cycling* (Debtor 14000). Your new customer should be supplied from the factory in Hamburg (HH00) via the sales organization Germany North (DN00). Remember that in Europe, the EURO is the usual currency. Notice that you thus need to expand the rights of your customer *Alster Adventures* to the effect that the company can release cross-division orders for the division accessories and cross-division.

Subsequently, please order five mountain bikes for men and five mountain bikes for women in the role of *Alster Adventures*. Since *Alster Adventures* is a long-term customer, the company gets 50\$ discount on each ordered mountain bike and an additional discount of 3% of the net price for the complete purchase.

**Note** the new customer will be created by references to a German customer, so the standard communication language is automatically set to German.

**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.

