

# Sales and Distribution (SD)

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

## Product

S/4HANA 1809  
Global Bike

Fiori

## Level

Beginner

## Focus

Sales and Distribution

## Authors

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## Version

3.3

## Last Update

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## MOTIVATION

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

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

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

## PREREQUISITES

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

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

## NOTES

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

## Process Overview

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

**Time** 120 min

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

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

Maria Diaz (Sales Person 1)

Matthias Dosch (Sales Person 2)

Sandeep Das (Warehouse Supervisor)

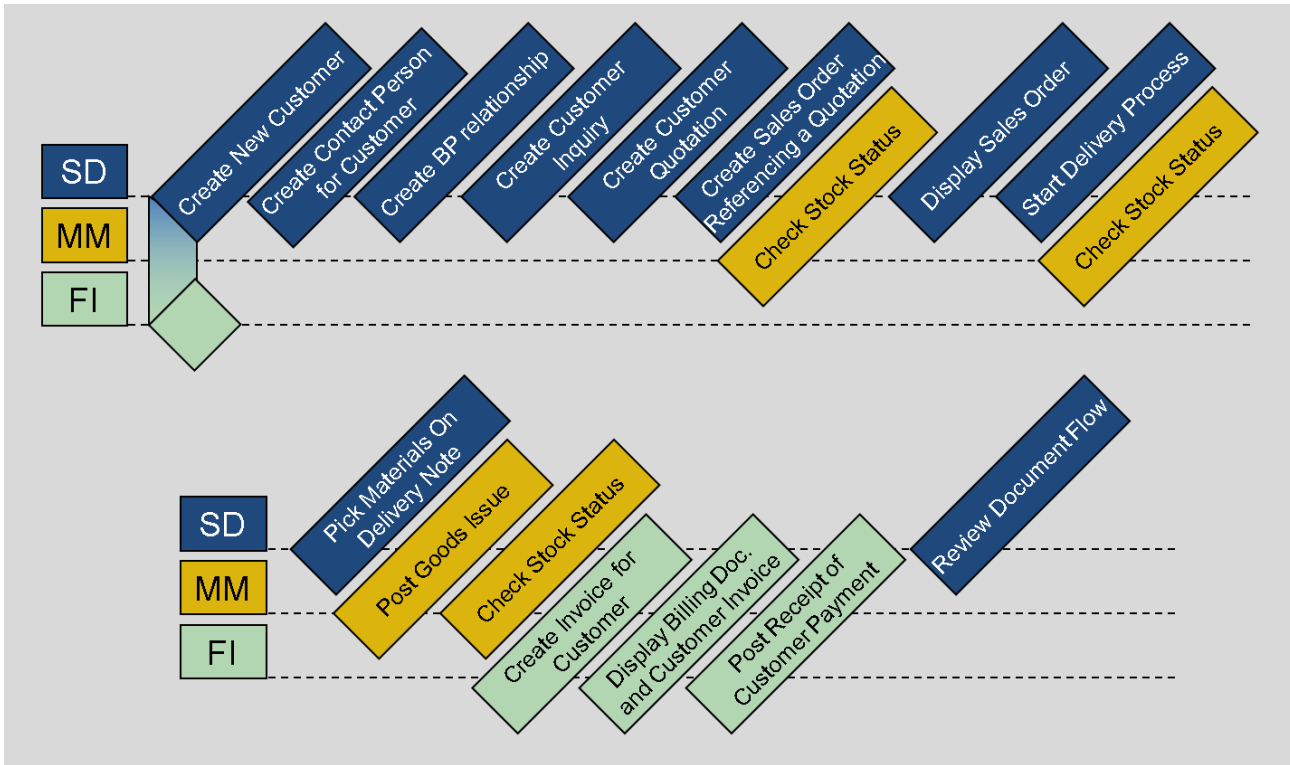
Sergey Petrov (Warehouse Employee)

Stephanie Bernard (Billing Clerk)

Jamie Shamblin (Cost Accountant)

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

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



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## Step 1: Create New Customer

**Task** Create a new customer.

**Time** 15 min

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

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

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

To create a new customer, use the app *Maintain Business Partner*.

Fiori App




In the *Maintain Business Partner* screen choose **Organization**.

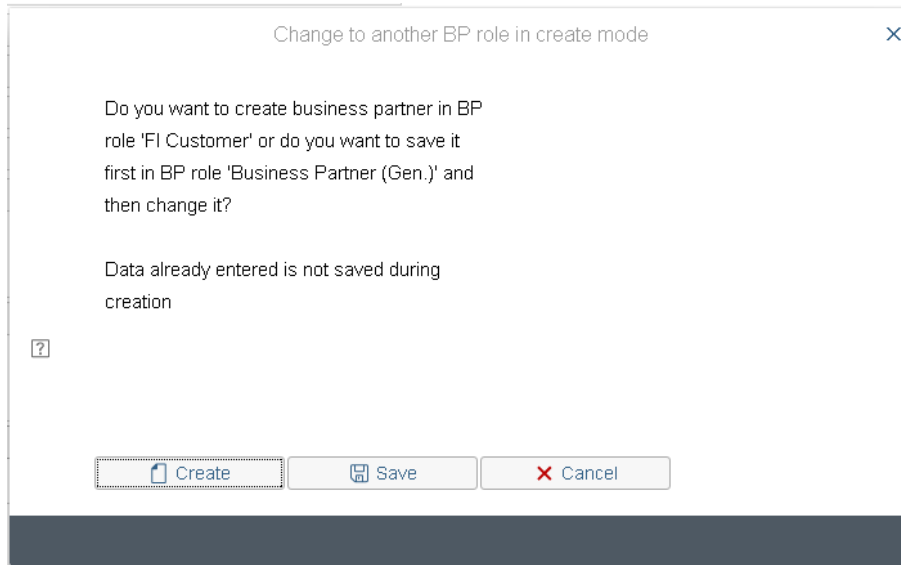
Organization

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

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

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

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





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

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

Select **English** for Language.

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

Business Partner:   Grouping: Internal r

\* Create in BP role: FI Customer (New)  

[Address](#) [Address Overview](#) [Identification](#) [Control](#) [Payment Transactions](#) [Sta](#)

Name

Title:

\* Name:

Salutation:

Salutation:

Search Terms

\* Search Term 1/2:


Special Customer

VIP

Undesirable Customer Reason Undes.:

Comment:

Standard Address

 Print Preview


Street Address

Street/House number:

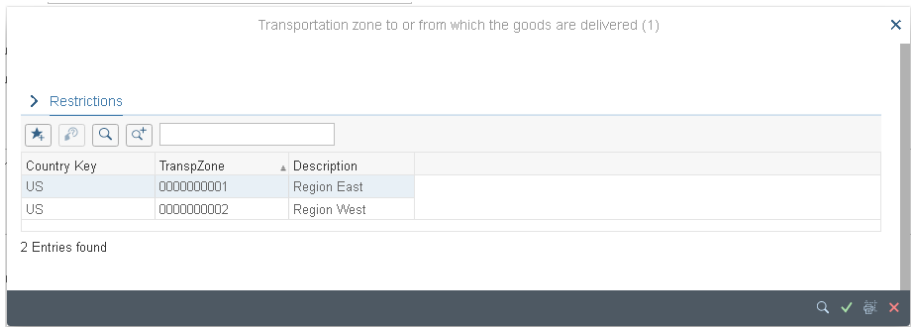
\* Postal Code/City:

\* Country:  USA \* Region:  Florida

Time zone:

Then click on the expand icon  (on the right of Standard Address) to access additional street address fields.

Scroll down and click on the search icon next to the Transportation Zone field or click into the field Transportation Zone and press the F4 key. This will produce the following pop-up window.



Double-click on **Region East** to select it.

Region East

\* Country:                       Region:

Time zone:                       Tax Juris.:

Transportation Zone:

Structure Group:


Undeliverable:


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

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

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



Business Partner:  

\* Create in BP role:  

---

Company Code

Company Code:

Customer:

Vendor:

[Customer: Account Management](#)    [Customer: Payment Transactions](#)

Account Management

Reconciliation acct:

Head office:

Sort key:

Subsidy Indicator:

Authorization Group:

Planning Group:

Release Group:

Value Adjustment:

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

110000  
001

[Customer: Account Management](#)    [Customer: Payment Transactions](#)

---

Account Management

\* Reconciliation acct:  Trade Accounts receivables

Head office:

Sort key:  Posting date

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

0001

In the drop down menu on the top Create in BP role choose **Customer**.

Business Partner:

\* Create in BP role: FI Customer (New)

- Correspondence Recipient
- Counterparty
- Court
- Creditor
- Cust. Authorized Drawer
- Cust. Bill-To Party
- Customer**
- Depository Bank
- External Company
- FI Customer (New)

Company Code

Company Code

Customer

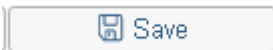
Vendor

Customer: Account Manager

Data

Payment terms: 0001

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

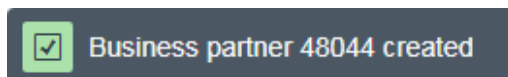


Change to another BP role in create mode

Do you want to create business partner in BP role 'Customer' or do you want to save it first in BP role 'FI Customer' and then change it?

Data already entered is not saved during creation

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



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

UE00  
WH  
BI

Business Partner:  The Bike Zone / Orlando FL 32804

\* Change in BP role:

---

Sales Area

Sales Org.:  US East

Distr. Channel:  Wholesale

Division:  Bicycles

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

US0003  
USD  
01  
1

Orders Shipping Billing Documents Partner Functions Additional Data Status Customer: Texts

Order

Sales District:\*  Southeast USA

Customer Group:

Sales Office:

Sales Group:

Authorization Group:

Account at customer:

Order Probability:  %

Item proposal:

ABC Class:

Rounding off:

Unit of Measure Grp:

PP customer proced.:

Currency:\*  United States Dollar

Exchange Rate Type:

---

Pricing/Statistics

Price Group:\*  Bulk buyer

Cust.Pric.Procedure:\*  Standard

Price List:

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

Check with the screen below.

02  
01  
MI00  
3

Orders	Shipping	Billing	Documents	Partner Functions
<b>Shipping</b>				
Delivery Priority:	<input type="text" value="2"/>	Normal item		
Order Combination:	<input checked="" type="checkbox"/>			
Delivering Plant:	<input type="text" value="MI00"/>	DC Miami		
Shipping Conditions:	<input type="text" value="01"/>	Standard		
POD-Relevant:	<input type="checkbox"/>			
POD Timeframe:	<input type="text"/>			
<b>Partial Deliveries</b>				
Complete Delivery:	<input type="checkbox"/>			
Max.Part.Deliveries:	<input type="text" value="3"/>			
Part.dlv./item:	<input type="text"/>	Partial delivery allowed		
Unlimited Tolerance:	<input type="checkbox"/>			

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.

FOB Miami  
0001  
01  
0

Check with the screen below

Delivery and Payment Terms


Incoterms Version:	<input type="text"/>
Incoterms:	<input type="text" value="FOB"/>
Incoterms Location 1:	<input type="text" value="MIAMI"/>
Incoterms Location 2:	<input type="text"/>
Payment terms:	<input type="text" value="0001"/> Pay immediately w/o deduction

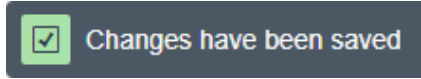
Accounting


Acct Assmt Grp Cust.:

Output Tax

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

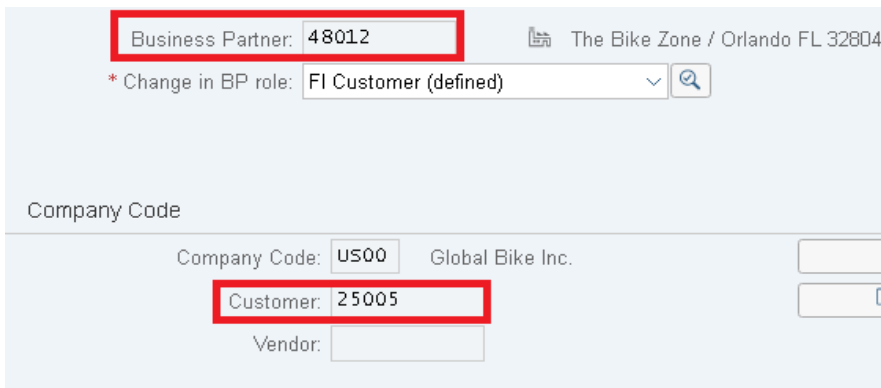
Click on  to save your new customer data. The SAP-System creates a unique customer number.



Choose again **FI Customer (defined)** in the drop-down menu Change in BP role. If necessary, choose the button 

FI Customer (defined)


**Note:** You have created a customer with a unique number. And for this customer you have also created a unique Business partner number. With the Business partner number, you can assign your customer more roles.



The screenshot shows a SAP Fiori form for creating a customer. At the top, the 'Business Partner' field contains the value '48012' and is highlighted with a red box. Below it, the '\* Change in BP role:' dropdown menu is set to 'FI Customer (defined)'. Under the 'Company Code' section, the 'Company Code' field contains 'U500' and the 'Customer' field contains '25005', both highlighted with red boxes. The 'Vendor' field is empty. The breadcrumb 'The Bike Zone / Orlando FL 32804' is visible at the top right of the form area.

Business partner number:

Customer number:

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



## Step 2: Create Contact Person for Customer

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

**Time** 10 min

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

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

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

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

Fiori App



In the *Create Business Partner* screen choose **Person**.

Person


In the drop down menu Create in BP role choose **Contact Person**. In the pop-up *Change to another BP role in create mode* choose **Create**.


Contact Person

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

Title  
First name  
Last name  
###  
EN  
US


Check with the screen below and click on the button **Save**.

Business Partner:   Grouping: Internal number assignment


\* Create in BP role:  

[Address](#) [Address Overview](#) [Identification](#) [Control](#) [Payment Transactions](#) [Status](#)

Name

Title:  

First name:


Last name:  

\* Correspondence lang.:

Search Terms

Search Term 1/2:


Standard Address

 Print Preview

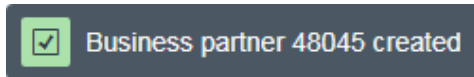
Street Address

Street/House number:


Postal Code/City:

\* Country:  Region:  

Your contact person will be given a unique number.



Contact person number: \_\_\_\_\_

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



## Step 3: Create BP relationship

**Task** Create BP relationship.

**Time** 5 min

**Short Description** Use the SAP Fiori Launchpad 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 assign your new customer with the contact person you created in the step before, use the app *Create BP relationship*.

Fiori App



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

F4  
Has Contact Person


Relationship Catego (1)

> Restrictions

🔍 🔍

RelCat	Direction	Description
BBP002	->	Has the Invoicing Party
BUR001	->	Has Contact Person
BUR002	->	Has Activity Partner
BUR003	->	Has Shared Living Arrangement Member
BUR004	<->	Is Married To
BUR006	<->	Is Identical To
BUR010	->	Has the Employee
BUR011	->	Has the Employee Responsible
BUR013	->	Is Replaced By
BUR020	->	Has Department
BUR021	->	Has Child
BUR022	->	Is Guardian
BUR023	<->	Is Related To
BUR024	->	Has Partner in Marriage Partnership
BUR025	->	Has Service Provider
BUR998	<->	Test: Partner <-> Partner
BURC01	->	Is Shareholder Of
CRMH04	->	Has the Bill-To Party

🔍 ✓ 🗑️

Confirm with .



F4

The Bike Zone  
###

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

You will get the following overview.

Name 1/last name	Name 2/First name	Search term 1	Search term 2	BPC	Partner
THE BIKE ZONE		000		2	48012

1 Entry found

Select your entry and confirm with

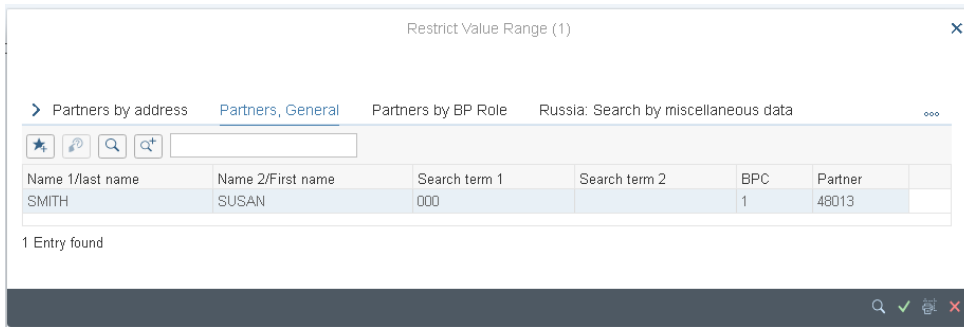
Back in the *Create BP relationship: Initial* screen choose again the **F4 help** in the field Business partner 2.

F4

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

###  
Last name contact person

Select your line and choose



Back in the *Create BP Relationship: Initial Screen* enter for Valid from **01/01/current year to 12/31/9999** and click on **Execute**.

01/01/current year  
12/31/9999

Relationship Category:

Business Partner 1:

Business Partner 2:

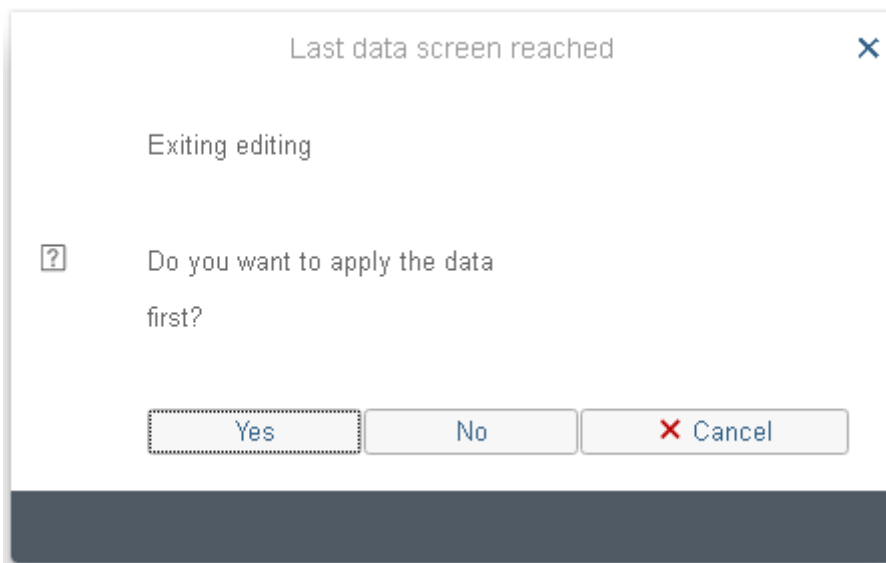
Valid From:

Valid To:

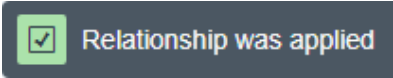
In the following screen enter **1** for VIP (management), **0002** for Department (Purchasing) and **0002** for Function (Purchasing Manager). Choose **Continue**.

1  
0002  
0002

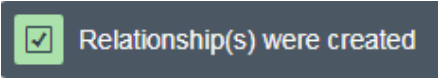
In the tab Sales and Distribution Data choose again **Continue**.




In the pop up choose **Yes** to save your entries. You will get the following success message.



Choose Save.



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



## Step 4: Create Customer Inquiry

**Task** Create a customer inquiry.

**Time** 10 min

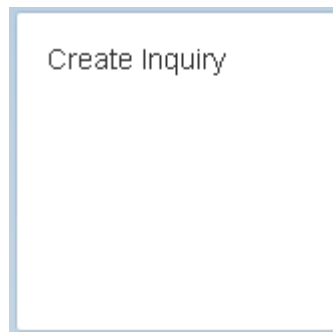
**Short Description** Use the SAP Launchpad to create a customer inquiry.

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

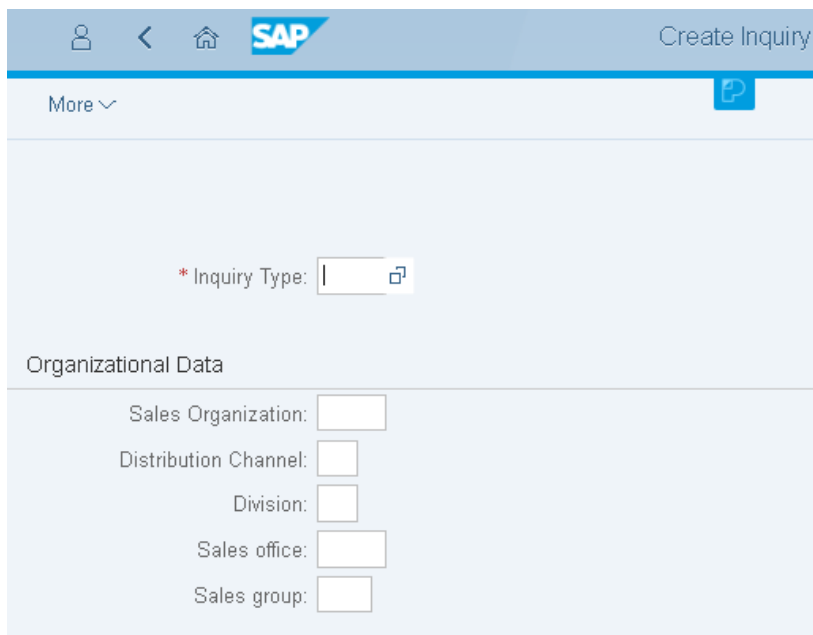
Now we will enter an inquiry from our new customer, The Bike Zone. An inquiry is a customer's request to be provided with sales information without obligation. An inquiry can relate to materials or services, conditions, and if necessary delivery dates.

To create an inquiry, use the app *Create Inquiry*.

Fiori App



This will produce the following screen.



The screenshot shows the SAP Fiori 'Create Inquiry' app interface. At the top, there is a header bar with a user icon, navigation arrows, the SAP logo, and the title 'Create Inquiry'. Below the header, there is a 'More' dropdown menu and a blue icon. The main content area is divided into sections. The first section is labeled '\* Inquiry Type:' followed by a text input field and a small square icon. Below this is a section titled 'Organizational Data' which contains five input fields: 'Sales Organization:', 'Distribution Channel:', 'Division:', 'Sales office:', and 'Sales group:'.


IN  
UE00  
WH  
BI

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.

The screenshot shows a SAP inquiry screen with the following fields and options:

- Inquiry:** [Empty field]
- Net Value:** 0.00
- Sold-To Party:** [Empty field with search icon]
- Ship-To Party:** [Empty field]
- Cust. Reference:** [Empty field]
- Cust. Ref. Date:** [Empty field]
- Sales:** [Selected]
- Item Overview:** [Selected]
- Item detail:** [Unselected]
- Ordering party:** [Unselected]
- Procurement:** [Unselected]
- Shipping:** [Unselected]
- Valid From:** [Empty field]
- Valid To:** [Empty field]
- Req. Deliv.Date:** D 27.02.2017
- Expect.Ord.Val.:** 0.00
- Group:** [Empty field]
- All Items:** [Checked]
- Table:**

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

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

The screenshot shows the 'Restrict Value Range (1)' search dialog with the following fields:

- Customers (general):** [Selected]
- Search term:** [Empty field]
- Country:** [Empty field]
- Postal Code:** [Empty field]
- City:** [Empty field]
- Name:** [Empty field]
- Customer:** [Empty field]
- Maximum No. of Hits:** 500
- Buttons:** Find, Cancel

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

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

###  
Orlando

The screenshot shows the search results in the 'Restrict Value Range (1)' dialog. The results table is as follows:

SearchTerm	Cty	PostalCode	City	Name 1	Customer
000	US	32804	ORLANDO	THE BIKE ZONE	25005

1 Entry found



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

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

###  
today's date  
one month from today

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

SAP Create Inquiry: Overview  
 Display Propose Items Header Output Preview Reject Document More  
 Inquiry:  Net Value:  0,00 USD  
 Sold-To Party:  25005 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804  
 Ship-To Party:  25005 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804  
 Cust. Reference:  000 Cust. Ref. Date:  27.02.2017  
 Sales **Item overview** Item detail Ordering party Procurement Shipping Reason for rejection  
 Valid From:  27.02.2017 Valid To:  27.03.2017  
 \* Req. Deliv. Date:  D  27.02.2017 Expect. Ord. Val.:  0,00 USD

The Bike Zone wants prices on two products – the Deluxe Touring Bike (black) and the Professional Touring Bike (black). To find these products, we need to use the search function. Click on the material field in the first item line, then click on the search icon . Make sure you are on the *Sales material by description* tab. You can find them by using .

Restrict Value Range (1)  
 Materials by several classes Material by product hierarchy **Sales material by description**  
 Material description:   
 Language Key:  EN  
 Sales Organization:  UE00  
 Distribution Channel:  WH  
 Material:  \*000  
 Maximum No. of Hits:  500  
 Find Cancel

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

UE00  
WH  
\*###



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

Order Quantity and Delivery Date

Order Quantity: 1 EA 1 EA <-> 1 EA

First Delivery Date: D 27.02.2017

---

General Sales Data

Net Value: 15.000,00 USD Exch. Rate: 1,00000

Pricing date: 27.02.2017

Material Entered: DXTR1000

EAN/UPC: Preference:

Engineering change: BOM explosion number:

Usage:

Business Trans. Type:

Reason for Rejection:

Order Probability: 30 Alternative to item:

The order probability of 30% is the default value for Global Bike Inc. for inquiry documents. The expected order value is  $0.30 \times \$21,400.00 = \$6,420.00$ . 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%** Order Probability:  , then choose Next Item  to get to PRTR1###. There change the Order Probabilities to **70%** again.  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: 27.02.2017 Valid To: 27.03.2017

\* Req. Deliv.Date: D 27.02.2017 Expect.Ord.Val.: 14.980,00 USD


All items

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

Furthermore, you can check the availability of your material. Therefore,

select your item  Item  Material   and click on Display availability  . 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:  Confirmed issues:

ATP situation

<input type="checkbox"/> Date	MRP ...	MRP element data	Rec./reqd qty	Confirmed
<input type="checkbox"/> 27.02.20..	Stock		100	
<input type="checkbox"/> 27.02.20..	SLocSt	FG00	100	

How many bikes of you PRTR1### are available?


---

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

 Inquiry 1000009 has been saved.

Inquiry number:

---

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



## Step 5: Create Customer Quotation

**Task** Create a customer quotation.

**Time** 10 min

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

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

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

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

Fiori App

To do this, use the app *Manage Sales Quotations*.



Click on [Create Quotation](#).

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

QT

Create with Reference

Inquiry Quotation Order Contract SchedAgree BillDoc

Inquiry:

Requested Deliv.Date:

Search Criteria

Pur. Order:

Sold-to party:

WBS Element:

Search

Copy Item Selection 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.

Sales Document (1)

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

Purchase Order No.:

Sales Organization:

Sold-to party:

Distribution Channel:

Division:

Sales office:

Sales group:

Created by:

Sales document type:

Customer Ref. Date:

Transaction group:

Sales document:

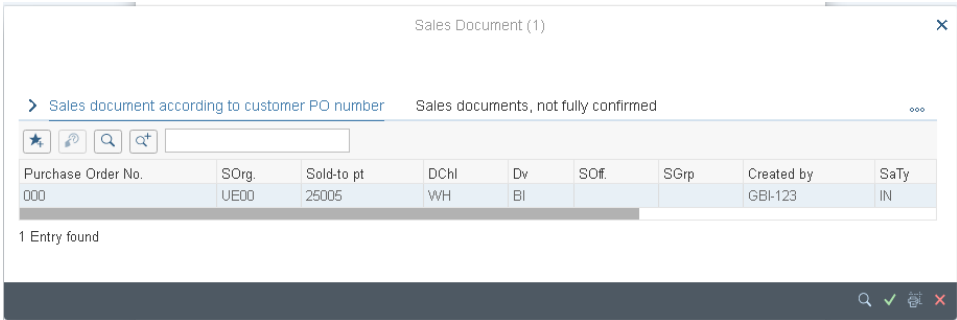
Item (SD):

Maximum No. of Hits:

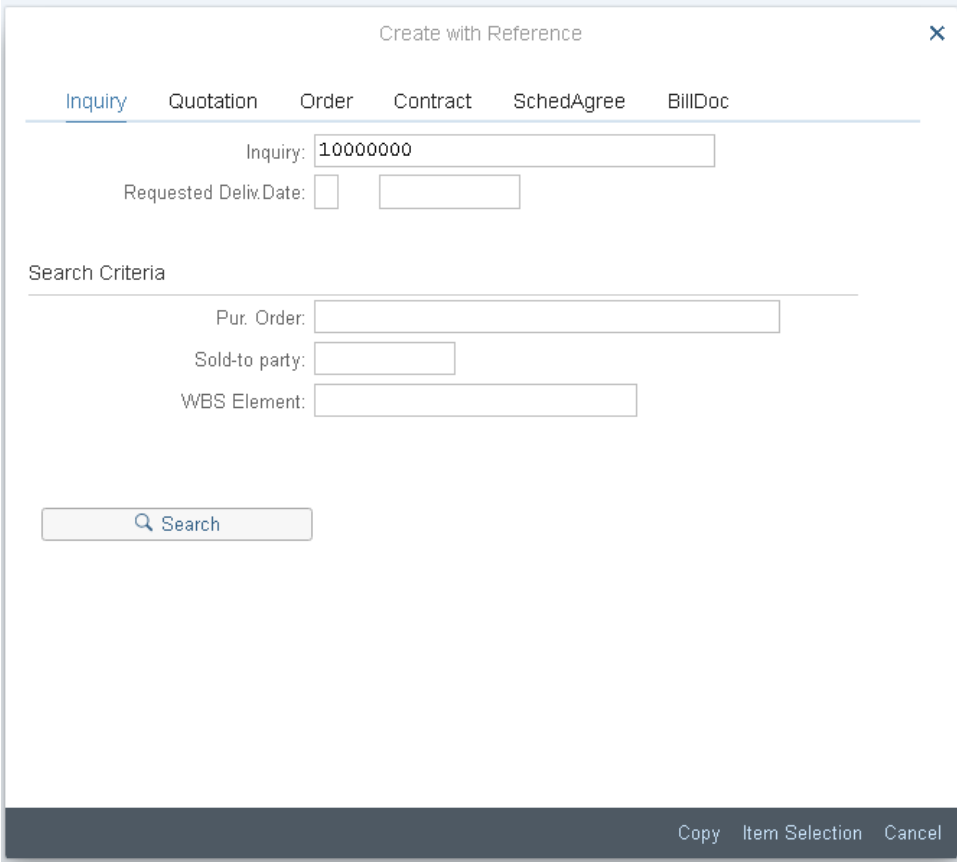
Find Cancel

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

###



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



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

Quotation:  Net Value:  USD

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

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

Cust. Reference:  Cust. Ref. Date:

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

Valid From:  Valid To:

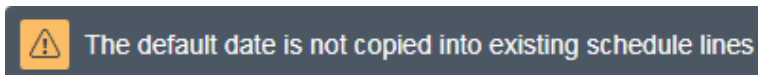
\* Req. Deliv.Date:   Expect.Ord.Val.:  USD

All Items

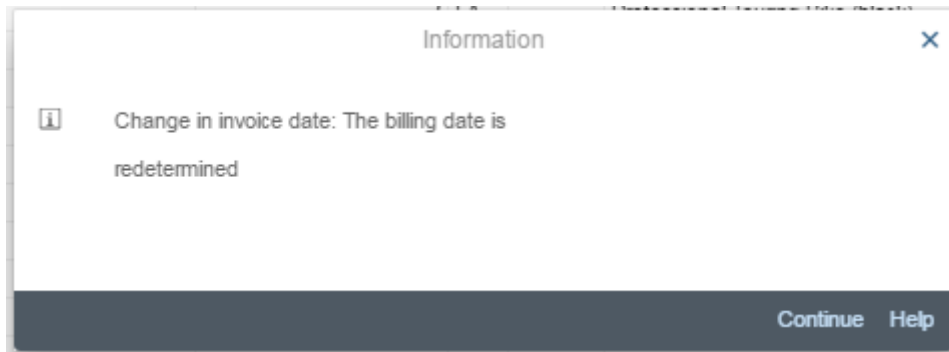
Item	Material	Order Quantity	SU	AltItm	Description
<input type="checkbox"/>	10 DXTR1000		5 EA		Deluxe Touring Bike (black)
<input type="checkbox"/>	20 PRTR1000		2 EA		Professional Touring Bike (black)

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

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




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



Click on Continue to acknowledge this information.

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

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

Quantity:  EA      Net:  USD  
 Tax:

Condition rec.      Analysis      Update

L..	CnTy	Name	Amount	Crcy	per	UoM	Condition Value	Curr.	Status	Num...	A
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PR00 Price	3.000,00	USD	1	EA	15.000,00	USD		1	
<input type="checkbox"/>		Gross Value	3.000,00	USD	1	EA	15.000,00	USD		1	
<input type="checkbox"/>		Discount Amount	0,00	USD	1	EA	0,00	USD		1	
<input type="checkbox"/>		Rebate Basis	3.000,00	USD	1	EA	15.000,00	USD		1	
<input type="checkbox"/>		Net Value for Item	3.000,00	USD	1	EA	15.000,00	USD		1	
<input type="checkbox"/>		Net Value 2	3.000,00	USD	1	EA	15.000,00	USD		1	
<input type="checkbox"/>		Total	3.000,00	USD	1	EA	15.000,00	USD		1	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SKTO Cash Discount	0,000	%			0,00	USD		0	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	VPRS Internal price	1.400,00	USD	1	EA	7.000,00	USD		1	
<input type="checkbox"/>		Standard - USA /With	1.600,00	USD	1	EA	8.000,00	USD		1	

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

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

K004  
50

Pricing Elements

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

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

Quantity:  EA      Net:  USD  
 Tax:

Condition rec.      Analysis      Update

L..	CnTy	Name	Amount	Crcy	per	UoM	Condition Value	Curr.	Status	Num..	AT
<input checked="" type="checkbox"/>	PR00	Price	3.000,00	USD	1	EA	15.000,00	USD			1
<input type="checkbox"/>		Gross Value	3.000,00	USD	1	EA	15.000,00	USD			1
<input checked="" type="checkbox"/>	K004	Material	50,00-	USD	1	EA	250,00-	USD			1
<input type="checkbox"/>		Discount Amount	50,00-	USD	1	EA	250,00-	USD			1
<input type="checkbox"/>		Rebate Basis	2.950,00	USD	1	EA	14.750,00	USD			1
<input type="checkbox"/>		Net Value for Item	2.950,00	USD	1	EA	14.750,00	USD			1
<input type="checkbox"/>		Net Value 2	2.950,00	USD	1	EA	14.750,00	USD			1
<input type="checkbox"/>		Total	2.950,00	USD	1	EA	14.750,00	USD			1
<input checked="" type="checkbox"/>	SKTO	Cash Discount	0,000	%			0,00	USD			0
<input checked="" type="checkbox"/>	VPRS	Internal price	1.400,00	USD	1	EA	7.000,00	USD			1
<input type="checkbox"/>		Standard - USA /With	1.550,00	USD	1	EA	7.750,00	USD			1

Note that the discount is now applied to the order. Click on the back icon



to return to the main quotation screen.

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

**More ▶ Go to ▶ Header ▶ Conditions**

Create Quotation: Overview

Out Preview    Reject Document    More v

Orders (F7)    21.150,00 USD

Document (Ctrl+Shift+F8)

Sales Document >

Edit >

Goto >

Extras >

Environment >

System >

Help >

GUI Actions and Settings >

Group

Overview

Header >

Item >

View

Back (F3)

Sales

Shipping

Contract Data

Billing

Payment Cards

Billing Plan

Accounting

Conditions

Order Quantity	SU	Altitm	Descript
5 EA			Deliver T

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

RA00  
5

Pricing Elements

<input type="checkbox"/> I...	CnTy	Name	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					11.150,00	USD

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



Pricing Elements

<input type="checkbox"/> I...	CnTy	Name	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-	%			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"/>	SKTO	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.

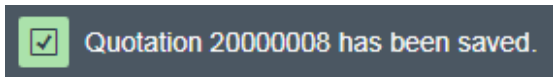
What is the difference between the first and the second discount regarding the DXTR1### and PRTR1###?


---



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Click on  to save the new quotation.



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





## Step 6: Create Sales Order Referencing a Quotation

**Task** Create a sales order with reference to a quotation.

**Time** 10 min

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

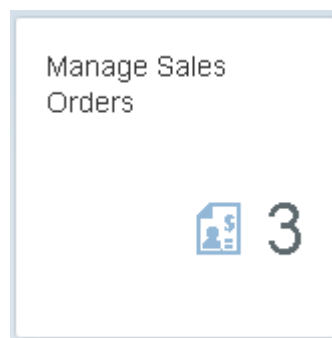
**Name (Position)** David Lopez (East Rep. Miami)


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

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

Fiori App

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



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

Sales Order	Sold-to party	Customer Reference	Requested Deliv.Date	Overall Status	Net Value
3	Beantown Bikes (5997)	Z997	27.05.2016	Completed	24.000,00 USD
2	Beantown Bikes (5998)	Z998	27.05.2016	Completed	15.000,00 USD
1	Beantown Bikes (5999)	Z999	27.05.2016	Completed	6.000,00 USD

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

[Create Sales Order](#)

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

OR

\* Order Type:

Organizational Data

Sales Organization:

Distribution Channel:

Division:

Sales office:

Sales group:

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

Create with Reference ×

Inquiry Quotation Order Contract SchedAgree BillDoc

Quot.:

Requested Deliv.Date:

Search Criteria

Pur. Order:

Sold-to party:

WBS Element:

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 Purchase Order

###

Number, then click on **Continue**.

Sales Document 1 Entry

Purchase Order No.	SOrg.	SoId-to pt	DCh1	Dv	SOFF.	SGrp	Created by	SAty	CustRefDat	TrG	Document	Item
100	UE00	25020	WH	BI			PURK	QT	20.04.2017	Z	Z0000003	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 the **Copy** icon to copy the information from the quotation into the sales order screen.

SAP Create Standard Order: Overview

Display Propose Items Header Output Preview Reject Document More

Standard Order:  Net Value:  USD

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

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

Cust. Reference:  Cust. Ref. Date:

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

\* Req. Deliv.Date:  Deliver.Plant:

Complete Div.:  Total Weight:  G

Delivery Block:  Volume:

Billing Block:  Pricing date:

Card type:  Exp.date:

Card Verif.Code:

Pyt Terms:  Pay immediately w/o deduction

Inco. Version:

Incoterm:

Inco. Location1:

Inco. Location2:

Order Reason:

Sales Area:    US East, Wholesale, Bicycles

Group


All items

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

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 **Save** to save the sales order. The SAP system will assign a sales order number.

###  
today's date

Standard Order 28 has been saved.

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

Back in the Fiori Launchpad look at the Manage Sales Orders app. You will see, that you have now one more sales order.



## Step 7: Check Stock Status

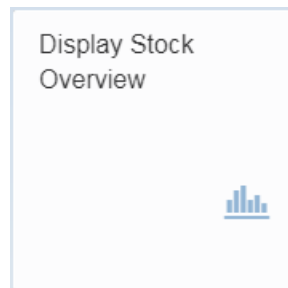
**Task** Check the inventory.

**Time** 5 min


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


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

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



Fiori App

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

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  
\*###

Material Number (1)

> Material by task list   Sales material by description   Material by material type   Material by Supply Area   ...

★ 🔄 🔍 🔍

Material description	Language	SOrg.	DChI	Material
AIR PUMP	EN	UE00	WH	PUMP1500
<b>DELUXE TOURING BIKE (BLACK)</b>	EN	UE00	WH	<b>DXTR1500</b>
DELUXE TOURING BIKE (RED)	EN	UE00	WH	DXTR3500
DELUXE TOURING BIKE (SILVER)	EN	UE00	WH	DXTR2500
ELBOW PADS	EN	UE00	WH	EPAD1500
FIRST AID KIT	EN	UE00	WH	FAID1500
KNEE PADS	EN	UE00	WH	KPAD1500
MEN'S OFF ROAD BIKE	EN	UE00	WH	ORMN1500
OFF ROAD HELMET	EN	UE00	WH	OHMT1500
PROFESSIONAL TOURING BIKE (BLACK)	EN	UE00	WH	PRTR1500
PROFESSIONAL TOURING BIKE (RED)	EN	UE00	WH	PRTR3500
PROFESSIONAL TOURING BIKE (SILVER)	EN	UE00	WH	PRTR2500
REPAIR KIT	EN	UE00	WH	RKIT1500
ROAD HELMET	EN	UE00	WH	RHMT1500
T-SHIRT	EN	UE00	WH	SHRT1500
WATER BOTTLE	EN	UE00	WH	BOTL1500
WATER BOTTLE CAGE	EN	UE00	WH	CAGE1500
WOMEN'S OFF ROAD BIKE	EN	UE00	WH	ORWN1500

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

Database Selections

Material:

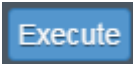
Plant:  to:

Storage Location:  to:

Batch:  to:

With the material number entered from the search list, enter **MI00** for Plant.

MI00

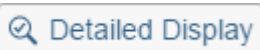
Then click on the execute icon  to look at the stock level.

Stock Overview

📄 ⬆️ 🔍 📄 Detailed Display



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


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 the  icon. This will give you very specific information about the inventory of black Deluxe Touring bikes.

Stock Overview: Basic List ✕

Stock Plant	
Plant M100	
Plant	
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.(plnt)	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

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  and review the stock level for this bike.

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



## Step 8: Display Sales Order

**Task** Display a sales order.

**Time** 10 min

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

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

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

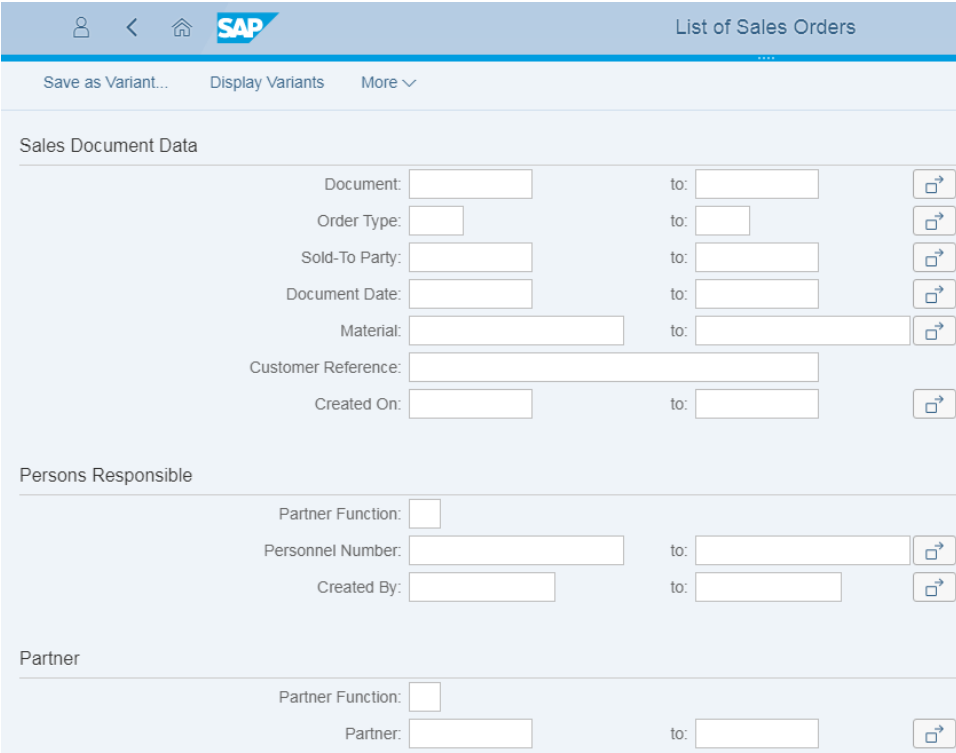
To display a sales order, use the app *List Sales Order*.

Fiori App




List Sales Orders


This will produce the following screen.





Save as Variant... Display Variants More ▾


**Sales Document Data**

Document:  to:  


Order Type:  to:  

Sold-To Party:  to:  

Document Date:  to:  


Material:  to:  


Customer Reference:

Created On:  to:  

**Persons Responsible**


Partner Function:

Personnel Number:  to:  

Created By:  to:  

**Partner**

Partner Function:

Partner:  to:  



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

Customer number  
###

Purchase Order Number	Doc. Date	Sales doc. type	Sales document	Item	Sold-to pt	Material
600	14.03.2017	OR	10	10	25010	DXTR1600
600	14.03.2017	OR	10	20	25010	PRTR1600

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

Change Standard Order 10: Overview

Standard Order: 10      Net Value: 20.092,50 USD

Sold-To Party: 25010 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804

Ship-To Party: 25010 The Bike Zone / 2144 N Orange Ave / Orlando FL 32804

Cust. Reference: 600      Cust. Ref. Date: 14.03.2017

Req. Deliv.Date: 14.04.2017      Deliver.Plant:      Total Weight: 57.170 G

Complete Div.:      Delivery Block:      Volume: 0,000


Billing Block:      Pricing date: 14.03.2017

Card type:      Exp.date:      Card Verif Code:      Pyt Terms: 0001 Pay immediately w/o deduction

Inco. Version:      Incoterms: FOB      Inco. Location1: Miami

Inco. Location2:      Order Reason:      Sales Area: UE00 / WH / BI US East, Wholesale, Bicycles

Item	Material	Order Quantity	Un	S	Description	Customer Material Num
10	DXTR1600	5	EA		Deluxe Touring Bike (black)	
20	PRTR1600	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.

Availability Overview

Material: DXTR1600  
Deluxe Touring Bike (black)

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

MRP Area: MI00      With reqmts qtys:      End lead time:      Base Unit: EA

Totals display

Receipts: 95      Issues: 0      Confirmed issues: 0

ATP situation

Date	MRP ...	MRP element data	Rec./reqd qty	Confirmed	Cum. ATP qty
30.03.2017	Stock			95	0
30.03.2017	SLocSt	F600		95	0

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

**Note** Your numbers may be different.

Choosing **More** → **Scope of check** will produce the following window.

Display Scope of Check x


Availability Check:  Individ.requirements  
 Checking Rule:  SD order

<p><b>Stocks</b></p> <p><input type="checkbox"/> With Safety Stock</p> <p><input type="checkbox"/> With Stock in Transfer</p> <p><input type="checkbox"/> With Quality Inspection Stock</p> <p><input type="checkbox"/> With Blocked Stock</p> <p><input type="checkbox"/> With Restricted-Use Stock</p>	<p><b>Requirements</b></p> <p><input checked="" type="checkbox"/> With Sales Requirements</p> <p><input checked="" type="checkbox"/> With Deliveries</p> <p style="text-align: right;">With Stock Transport Reqs: <input type="text" value="Exclude"/></p> <p><input checked="" type="checkbox"/> With Reservations</p> <p><input type="checkbox"/> With Dependent Requirements</p> <p style="text-align: right;">With Dependent Reservations: <input type="text" value="Exclude"/></p>
<p><b>Future Supply</b></p> <p><input type="checkbox"/> With Purchase Requisitions</p> <p style="text-align: right;">With Purchase Orders: <input type="text" value="X Include (for STO, use order quantity)"/></p> <p><input type="checkbox"/> With Shipping Notifications</p> <p style="text-align: right;">With Planned Orders: <input type="text" value="Exclude"/></p> <p style="text-align: right;">With Production Orders: <input type="text" value="Exclude"/></p>	<p><b>Replenishment Lead Time</b></p> <p><input type="checkbox"/> Without Replenishment Lead Time</p> <p><b>Special Scenarios</b></p> <p><input type="checkbox"/> Without Storage Location Check</p> <p><input type="checkbox"/> Without Subcontracting</p>
<p><b>Delayed Supply</b></p> <p><input type="checkbox"/> Without Receipts in Past</p> <p><input type="checkbox"/> Show Message for Delayed Supply</p>	<p><b>Missing Parts Processing</b></p> <p style="text-align: right;">Checking Period: Goods Receipt: <input type="text" value="0"/></p>

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 Close, then click on the back icon < to return to the overview screen.

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


Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	U...	Condition Value	Curr.	Status	Num...	ATO/MTS
<input type="checkbox"/>	PR00	Price	3.000,00	USD		1 EA	15.000,00	USD			1
<input type="checkbox"/>		Gross Value	3.000,00	USD		1 EA	15.000,00	USD			1
<input type="checkbox"/>	K004	Material	50,00-	USD		1 EA	250,00-	USD			1
<input type="checkbox"/>	RA00	% Discount from Net	5,000-	%			737,50-	USD			0
<input type="checkbox"/>		Discount Amount	197,50-	USD		1 EA	987,50-	USD			1
<input type="checkbox"/>		Rebate Basis	2.802,50	USD		1 EA	14.012,50	USD			1
<input type="checkbox"/>		Net Value for Item	2.802,50	USD		1 EA	14.012,50	USD			1
<input type="checkbox"/>		Net Value 2	2.802,50	USD		1 EA	14.012,50	USD			1
<input type="checkbox"/>		Total	2.802,50	USD		1 EA	14.012,50	USD			1
<input type="checkbox"/>	SKTO	Cash Discount	0,000	%			0,00	USD			0
<input type="checkbox"/>	VPRS	Internal price	1.400,00	USD		1 EA	7.000,00	USD			1
<input type="checkbox"/>		Standard - USA /With	1.402,50	USD		1 EA	7.012,50	USD			1

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

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

\_\_\_\_\_

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



## Step 9: Start Delivery Process

**Task** Start the delivery process.

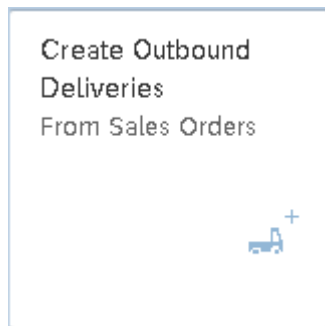
**Time** 5 min

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

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


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



Fiori App



This will produce the following screen.


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

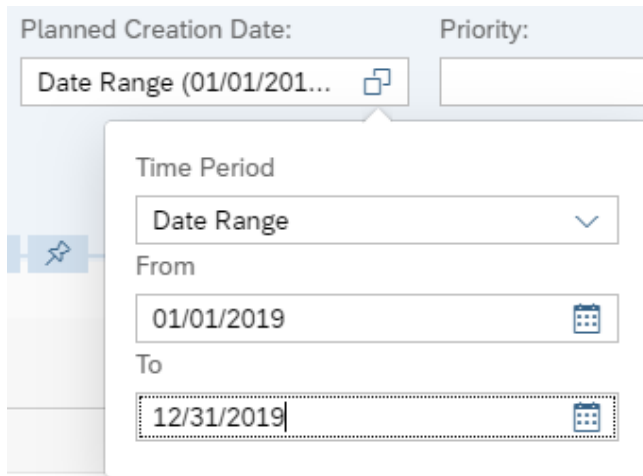
Use the F4 help in the field *Ship-To Party* .

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


\*###  
US


Items					
<input type="checkbox"/>	Cou...	Postal Code	City	Customer Name	Customer
<input type="checkbox"/>	US	32804	ORLANDO	THE BIKE ZONE	25010


In the pull-down menu *Planned Creation Date* choose **Date Range** for Time Period and 01/01/current year to 12/31/current year and click on .




Planned Creation Date:  Priority:


Time Period  
 

From  
 


To  
 


This will produce the following screen.

Create Outbound Deliveries (1)							
<input type="checkbox"/>	Planned Creation Date	Sales Document	Planned GI Date	Priority	Shipping Point	Ship-To Party	Gross Weight
<input type="checkbox"/>	03/13/2019	77	03/13/2019	Normal item (02)	SP Miami (MI00)	The Bike Zone (25019)	57,170.000 G >

Select the Sales Document and click on .

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

Create Outbound Deliveries (0)						
<input type="checkbox"/>	Planned Creation Date	Sales Document	Planned GI Date	Priority	Shipping Point	
No data found. Try adjusting the filter settings.						

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



## Step 10: Check Stock Status

**Task** Check the inventory.

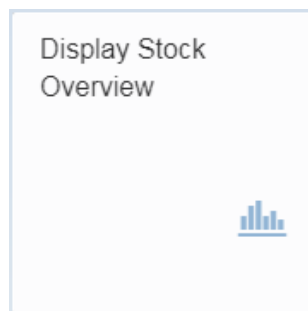
**Time** 5 min

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


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

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


Menu path



This will produce the following screen.

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 the execute icon . This will produce the following screen.

Stock Overview

Client/Company Code/Plant/Storage Location/Batch/Special Stock      Unrestricted use      Qual. inspection

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 on the  icon.


Stock Overview: Basic List


Stock Plant  
Plant MI00

Plant

Stock Type	Stock
Returns	0,000
On-Order Stock	0,000
Consgt ordered	0,000
Reserved	0,000
Stck trans.(plnt)	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

Navigation icons: ✓, ≡, ≡, 🔍, 🔍, 🏠

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

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



## Step 11: Check Outbound Delivery Status

**Task** Check the outbound delivery status.

**Time** 5 min

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

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

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

Fiori App

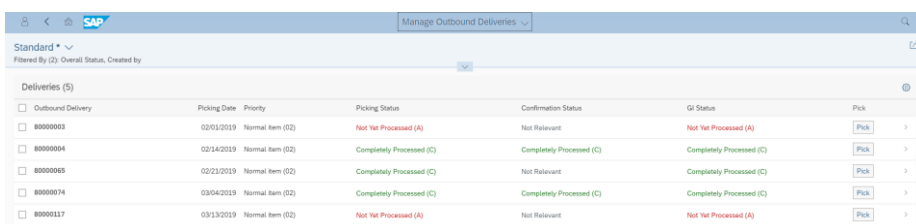


Manage Outbound Deliveries

Choose **Adapt Filters (1)**.

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

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



Outbound Delivery	Picking Date	Priority	Picking Status	Confirmation Status	GI Status	Pick
<input type="checkbox"/> 80000003	02/01/2019	Normal Item (02)	Not Yet Processed (A)	Not Relevant	Not Yet Processed (A)	<input type="button" value="Pick"/>
<input type="checkbox"/> 80000004	02/14/2019	Normal Item (02)	Completely Processed (C)	Completely Processed (C)	Completely Processed (C)	<input type="button" value="Pick"/>
<input type="checkbox"/> 80000005	02/21/2019	Normal Item (02)	Completely Processed (C)	Not Relevant	Completely Processed (C)	<input type="button" value="Pick"/>
<input type="checkbox"/> 80000074	03/04/2019	Normal Item (02)	Completely Processed (C)	Completely Processed (C)	Completely Processed (C)	<input type="button" value="Pick"/>
<input type="checkbox"/> 80000117	03/13/2019	Normal Item (02)	Not Yet Processed (A)	Not Relevant	Not Yet Processed (A)	<input type="button" value="Pick"/>

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

**Pick**.



**Delivery Header**

Delivery: 80000013

Actual GI Date:

Planned GI Date:

Gross Weight:

Net Weight:

Picking Status:

Confirmation Status:

[Show More](#)

0 of 2 Picking >> 0 GI Not Ready 0

Delivery Items (2)

<input type="checkbox"/>	Item	Material	Delivery Quantity	Picking Q...	Serial N...	Picking...	Confirm...
<input type="checkbox"/>	000010	Deluxe Touring Bike (black) (DXTR1008)	<input type="text" value="5"/> EA <input type="button" value="Copy"/>	<input type="text" value="5"/> EA	◇	<input type="text" value=""/>	◇ >
<input type="checkbox"/>	000020	Professional Touring Bike (black) (PRTR1008)	<input type="text" value="2"/> EA <input type="button" value="Copy"/>	<input type="text" value="2"/> EA	◇	<input type="text" value=""/>	◇ >

In the field Picking Quantity enter **5** for your material DXTR1### and **2** for your material PRTR1###.

5  
2

Delivery Items (2)

<input type="checkbox"/>	Item	Description	Delivery Quantity	Picking Quantity	Picking Status	Confirmation Status
<input type="checkbox"/>	000010	Deluxe Touring Bike (black)	<input type="text" value="5"/> EA <input type="button" value="Copy"/>	<input type="text" value="5"/> EA	<input type="text" value=""/>	◇ >
<input type="checkbox"/>	000020	Professional Touring Bike (black)	<input type="text" value="2"/> EA <input type="button" value="Copy"/>	<input type="text" value="2"/> EA	<input type="text" value=""/>	◇ >

**Note:** Picking is the process of preparing or providing goods for delivery to the customer with special attention paid to dates, quantity and quality.

Click on  next to your Deluxe Touring Bike. In the screen delivery Item 1 of 2 enter **FG00** (Finished Goods) for the Storage Location. Confirm with .

FG00

Delivery Item 000010

Sales Order:	15	Material:	Deluxe Touring Bike (black) (DXTR1008)
Sales Order Item:	000010	Gross weight:	42.550 G
Item Type:	Standard Item (TAN)	Net Weight:	42.550 G
Original Delivery Quantity:	5 EA	Volume:	0
Picking Quantity:	5 EA	Plant:	DC Miami (MI00)
Delivery Quantity:	5 EA	Storage Location:	FG00
Conversion Rate:	1 EA : 1 EA	Finished Goods:	
Base Unit Delivery Quantity:	5 EA	Storage Bin:	
		Material Availability:	05/21/2019

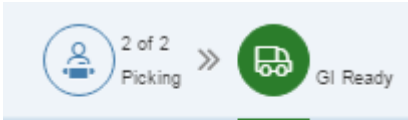
Repeat the steps for your material **PRTR1###**. Back in the screen Pick Outbound Delivery click on **Save**.

FG00




You should get the following message.

Now, the system will be ready to book the goods issue.



Status:  
Ready to Post GI

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



## Step 12: Post Goods Issue

**Task** Post a goods issue.

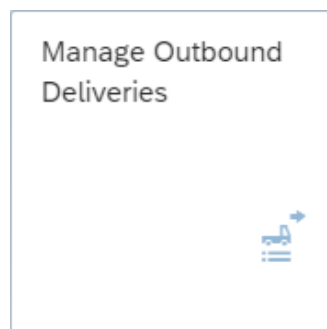
**Time** 5 min

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

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

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

Fiori App



This will produce the following screen.

Deliveries (1)							
<input checked="" type="checkbox"/>	Outbound Delivery	Picking Date	Priority	Picking Status	Confirmation Status	GI Status	Pick
<input checked="" type="checkbox"/>	90000013	05/21/2019	Normal Item (02)	Completely Processed (C)	Not Relevant	Not Yet Processed (A)	Pick >

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

**Adapt Filters (2)**

and then

**More Filters (10)**

. There you have to select **Created by**

and confirm your selection with **OK**. In the field of the newly created filter enter your user-name and press Enter.

Select your delivery.

Deliveries (1)						
<input type="checkbox"/>	Delivery	Picking Date	Priority	Picking Status	Confirmation Status	GI Status
<input type="checkbox"/>	80000008	20.04.2017	02	●	◇	□

Press

**Post GI (1)**


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

today

\*###  
Orlando

Goods Issue


Enter actual GI date for the 1 selected deliveries

20.04.2017 

OK Cancel

GI posted

You will receive the following message:

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



## Step 13: Check Stock Status

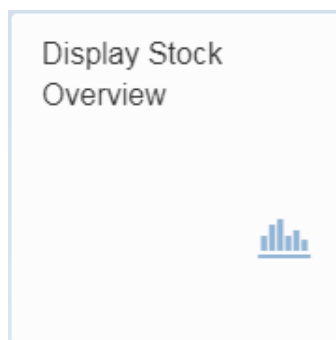
**Task** Check the inventory.

**Time** 5 min

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


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

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




Fiori App

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

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 . This will produce the following screen.

Stock Overview: Basic List

New Selection Refresh Print More ▾

Selection

Material:

Deluxe Touring Bike (black)


Material Type: FERT Finished Product

Unit of Measure:  Base Unit of Measure EA

Stock Overview

⏏ ⏴ 🔍 📄 ▾ 🔍 Detailed Display

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

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

Stock Overview: Basic List ✕


**Stock Plant**  
**Plant M100**


....

Plant

Stock Type	Stock
Unrestricted use	95,000
Qual. inspection	0,000
Returns	0,000
Stck trans.(plnt)	0,000
Transfer (SLoc)	0,000
Consgt unrestr.	0,000
Consgt qual.insp.	0,000
RetPckgCust.unres	0,000
Empties cust. QI	0,000
ConsgtCust.unrest	0,000
Consgt cust. QI	0,000
Stock in transit	0,000
SC stock unrestr.	0,000
SC stock QI	0,000
Sales order unre.	0,000
Sales order QI	0,000
Blocked	0,000
Sales order blkcd	0,000
Consgt blocked	0,000
RTP unrestr.-use	0,000
RTP stock in QI	0,000
RTP blocked	0,000
Project unrestr.	0,000
Project QI	0,000
Project blocked	0,000

✓ ≡ ≡ 🔍 + 🖨

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 home icon  to return to the Fiori Launchpad overview.



## Step 14: Create Invoice for Customer

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

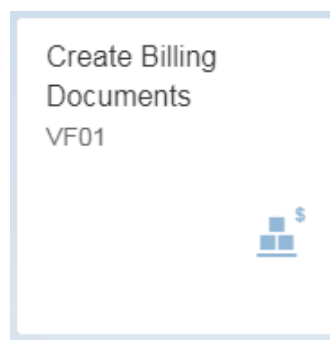
**Time** 10 min

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

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

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

Fiori App



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

Click on **Billing Due List** to find your Sales Document.



Today's date  
Customer number

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

**Display Billing List**

Make sure your customer is selected and click on

**Individual Billing Document**

<input type="checkbox"/>	S	BlCat	SOrg.	Billing Date	Sold-To Pt	BIIT	DstC	Document	DChl	Dv
<input checked="" type="checkbox"/>	X	L	UE00	30.05.2018	25026	F2	US	80000022	WH	BI

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

Item	Material	Item Description	Billed Quantity
<input type="checkbox"/>	10 DXTR1103	Deluxe Touring Bike (black)	5
<input type="checkbox"/>	20 PRTR1103	Professional Touring Bike (black)	2

Click on **Save** then on the home icon  to return to the Fiori Launchpad overview.

## Step 15: Display Billing Document and Customer Invoice

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

**Time** 5 min

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

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

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

Fiori App



This will produce the following screen.

 The screenshot shows the SAP Fiori app interface. At the top, there is a header bar with the SAP logo and the title 'Display Billing Document'. Below the header, there are navigation tabs: 'Billing Items', 'Accounting', 'Revenue Accounts', 'Display Document Flow', and 'More'. The main content area contains a search form. It starts with a label 'Billing Document:' followed by a text input field. Below this is a section titled 'More Search Criteria' which includes four more input fields: 'Document Number:', 'Company Code:', 'Fiscal Year:', and 'Reference:'. At the bottom of the form is a 'Search' button with a magnifying glass icon.


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.

F4  
Sold-to party

Double click at your Billing Document Number.

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

Fiori App  
F4  
Orlando  
\*###

Search term and click on . Write down your Sold-to party number and restart this step.

Billing Document (1) x

**Restrictions**

Billing Document:

Billing Type:

Sold-to party:

Payer:

Billing date:

Sales Organization:

Distribution Channel:


Posting Status:

Maximum No. of Hits:

Bill. Doc.	BillT	Sold-to pt	Payer	Bill. date	SOrg.	DChl	PsSt
90000006	F2	25020	25020	20.04.2017	UE00	WH	C

1 Entry found

Back in the *Display Billing Document* press .

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

Data Entry View

Document Number:  Company Code:  Fiscal Year:

Document Date:  Posting Date:  Period:

Reference:  Cross-Comp.No.:

Currency:  Texts Exist:  Ledger Group:

Co...	Item	Key	Account	Description	Amount	Curr.	Tx
US00	1	01	25012	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 home icon  to return to the Fiori Launchpad overview.



Step 16: Post Receipt of Customer Payment

**Task** Post a customer payment receipt.

**Time** 10 min

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

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

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

Fiori App



This will produce the following screen.

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


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

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

Customer

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.

###  
Orlando

Compare your screen with the screenshot below and press  .

Payment

Payment

General Information

\*Company Code: U500

\*Posting Date: 05/21/2019

\*Journal Entry Date: 05/21/2019

Value Date: 05/21/2019

Reference:

Period: 05

\*Journal Entry Type: DZ (Customer Payment)

Bank Data

\*G/L Account: 100000

House Bank/Account ID:

\*Amount: 20,092.50 USD

Fees: 0.00

Assignment:


Exchange Rate:

Open Item Selection

Account Type/Account ID: Customer 25012

Payment Reference:

Propose Items



In the list of Open Items click on the  button.


The screen shows you a 0.00 balance **Balance: 0,00 USD** (in the right corner).


Open Items (1) | Standard \* ▾

Compa...	Account	Journal Entry	Journal...	Item Text	Journal Entry Date	Net Due Date	Amount (USD)	Assignment	Clear
US00	25012	90000005	RV		05/21/2019	05/21/2019	20,092.50	0090000005	<input checked="" type="checkbox"/>

Items to Be Cleared (1) | Standard ▾


Remove	Journal Entry	Open Amount ...	Allocated Amo...	Discount Amo...	Invoice Refere...
	90000005	20,092.50 	20,092.50	0.000	

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


 **Success**

---

Journal entry 1400000005 (2019, US00) successfully posted

 [Post Next Payment](#)

Click on [Display](#).

Journal Entry (1400000005) - Entry View 


Header	0	0	0
Attachments	Notes	Related Documents	
Journal Entry Date: 05/21/2019	Company Code: US00 (Global Bike Inc.)		
Posting Date: 05/21/2019	Transaction Currency: USD		
Posting period: 5 / 2019	Company Code		
Journal Entry Type: DZ (Customer Payment)	Crcy:		
Created: by LEARN-008 on 05/21/2019	Company Code		
	Crcy:		

Line Items (2) | Standard ⌵ ⚙️ 📄 ⌵

Posting View Item	G/L Account	Profit Center	Debit
000001	100000 (Bank)		20,092.50 USD >
Credit: 0.00 USD			
000002	110000 (Trade Receivables)		0.00 USD >
Credit: 20,092.50 USD			

Tax (0) | Standard ⌵ ⚙️ 📄 ⌵

Tax Code	G/L Account	Tax Base Amount	Debit	Credit	Tax Rate
No data found. Try adjusting the filter settings.					

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

## Step 17: Review Document Flow

**Task** Review the document flow.

**Time** 5 min

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

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

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


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

Fiori App



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

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

**today**. Compare your screen with the screenshot below and press  .

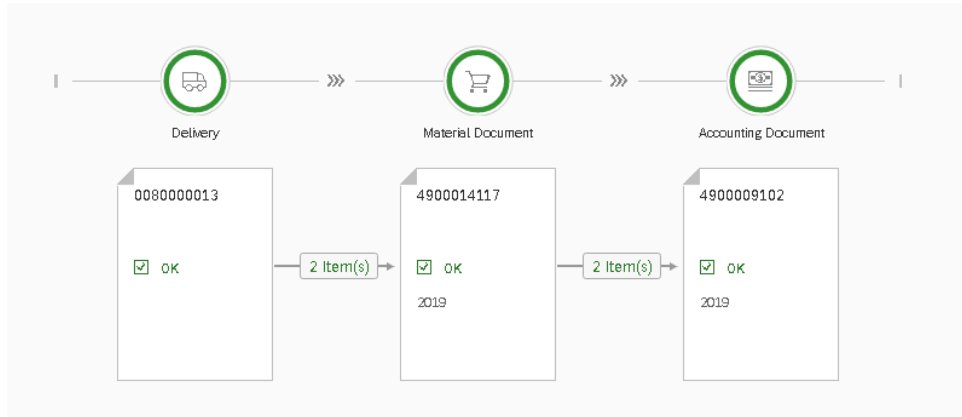
You will get an overview of the items.


Material Document	Material Document Year	Material	Plant	Storage location	Posting Date
4900014117	2019	Deluxe Touring Bike (black) (DXTR1008)	DC Miami (MI00)	Finished Goods (FG00)	05/21/2019
Stock Type: Unrestricted-Use Stock (01)					
4900014117	2019	Professional Touring Bike (black) (PRTR1008)	DC Miami (MI00)	Finished Goods (FG00)	05/21/2019
Stock Type: Unrestricted-Use Stock (01)					

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

In the following screen click on **Process Flow**.

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



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

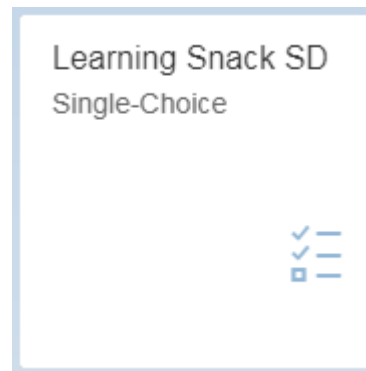




## Learning Snacks

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

Fiori App



SAP University Alliances

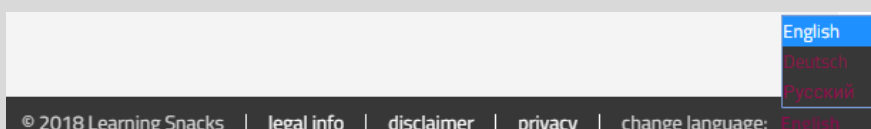
SAP University Alliances Snacks

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

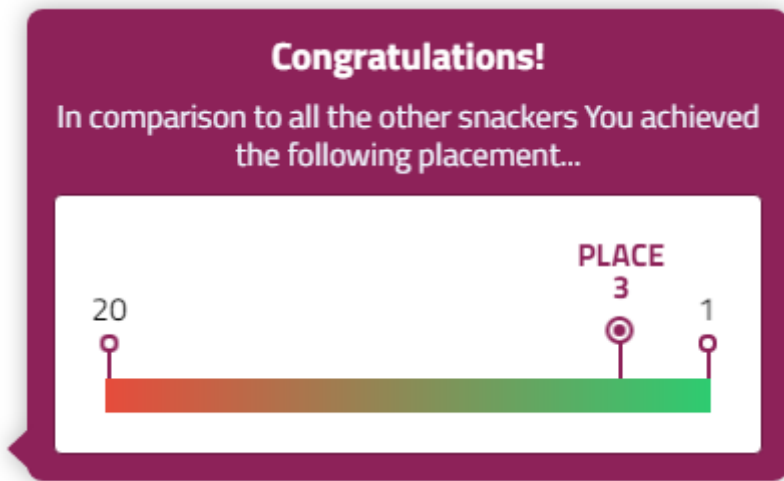
Learning Snack

### Hint:

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



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



 SD Challenge

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

**Time** 75 min

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

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

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

