SD 1: Display Customer Master Data

**Exercise** Use the SAP Easy Access Menu in order to display a customer.

**Task** Global Bike Inc. has several customers in the USA. Display one customer from the USA (Beantown Bikes).

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

To display a customer, follow the menu path:

```
Logistics ► Sales and Distribution ► Master Data ► Business Partner ► Customer ► Display ► Complete
```
Follow the menu path and double-click **Complete**.

In the next screen, the SAP system expects you to enter search criteria such as the customer, the company and the sales area data. You can use the SAP ad-hoc help to have the system explain particular fields on the screen. Position your cursor in the “Customer” field and press **F1**.
According to the SAP definition, SAP expects you to enter the unique Customer Account Number for the customer’s master record in the “Customer” field.

Press the button in the upper right corner of the screen in order to close the window.

Since you do not know any customer number in the GBI company, you need to find one. In order to do so, position your cursor once again in the field “Customer” and press F4.
The tabs allow you to enter different search criteria. The values in the text boxes are used to filter the search operation. In the tab *Customers (by company code)*, you can enter all information you have about a customer. In our case, please enter the **three-digit number (###)** you were given by your instructor into the field “Search term”.

**Please note:** Each time the curriculum material requests you to type in ###, please enter the three-digit number you received from your instructor. Since each participant receives his or her own master data, the three-digit number serves to distinguish between the individual data sets. Please remember that all participants work in the same GBI company and if you do not select any search criteria, you will see all master data (just like in a real company). If you wish to see all 1000 master data entries for each client, you can leave the field “Search term” empty.

After having entered your three-digit number (###) into the field “Search term”, position your cursor in the field “Company Code” and press **F4**. In the following screen, double-click on Global Bike Inc. to select this company. Afterwards, the field “Company Code” should be filled with **US00**.

Subsequently, click ✔️ or press Enter. Consequently, the following screen will come up. Please note that your customer number might be different from the
You can select **Beantown Bikes** by double-click. When doing so, the search result screen will close and your customer account number (**5###**) of Beantown Bikes will be displayed in the “Customer” field. Furthermore, the system automatically enters US00 into the field “Company code”. Please note that your customer account number might be different from the number presented in the following screen.
Click ✔ or Enter in order to display the master data for Beantown Bikes. The following screen will come up:
This screen displays the general data of your customer Beantown Bike. In the context of the SAP system, this data implies all information about the customer that are relevant for the whole GBI such as global names and the address. Click the other tabs in order to see further global data about Beantown Bikes. In order to display US-specific data, click the button „Company Code Data“.
Please check whether the company code number (US00) is displayed on the screen. Data such as reconciliation account or sort key are account management data which might display different values for other company codes.

Click ☐ to return to the SAP Easy Access Menu.
**SD 2: Display Customer Order**

**Exercise** Use the SAP Easy Access Menu in order to display a customer order.  
**Time** 10 Min.

**Task** Watch a customer order for black Deluxe Touring Bikes.

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

To display a customer order, follow the Easy Access Menu:

**Logistics ► Sales and Distribution ► Sales ► Order ► Display**

**Menu path**

Expand the menu path and double-click “Display”.

Enter 1 for “Order” to display a document of a customer order that has already
The order number is the number that clearly identifies the sales document. Generally, there are different types of sales documents in the SAP ERP System:

- Request
- Offer
- Order
- Master Contract
- Complaints

In the next screen, all details of the order placed by the company Beantown Bikes from Boston are displayed.

By means of this sales document, you can observe the typical division of the sales documents. They are composed of

- Document header
- Document items

The document header consists of data that is valid for the complete sales document, whereas the document items reflect the data of the individual goods that are listed in the sales document.

In the following screen, you can see the document header for the sales document with the number 1. As you can see, this sales order is listed under the purchase order number Z998 and its net value amounts to 15,000 $.

### Display Standard Order 1: Overview

<table>
<thead>
<tr>
<th>Standard Order</th>
<th>1</th>
<th>Net value</th>
<th>20,092</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sold-To Party</td>
<td>25002</td>
<td>The Bike Zone / 2144 N Orange Ave / Orlando FL 32804</td>
<td></td>
</tr>
<tr>
<td>Ship-To Party</td>
<td>25002</td>
<td>The Bike Zone / 2144 N Orange Ave / Orlando FL 32804</td>
<td></td>
</tr>
<tr>
<td>PO Number</td>
<td>002</td>
<td>PO date</td>
<td>02/28/2014</td>
</tr>
</tbody>
</table>
Please note: The purchase order number must not be confused with the number of the sales document, which in this case is the document of a standard order.

Whereas the purchase order number can be assigned freely, the document number is definite and is generated automatically while compiling the document.

In the overview of all positions, you can see that the order only contains the product Deluxe Touring Bike in black. Through this order, Beantown Bike ordered five bicycles of this kind.

Please select the line presenting the Deluxe Touring Bike (black).

<table>
<thead>
<tr>
<th>Item</th>
<th>Material</th>
<th>Order Quantity</th>
<th>Un</th>
<th>$</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 EXTR1998</td>
<td></td>
<td>SEA</td>
<td></td>
<td></td>
<td>Deluxe Touring Bike (black)</td>
</tr>
</tbody>
</table>

Subsequently, please click the symbol Item conditions 📊.

<table>
<thead>
<tr>
<th>Quantity</th>
<th>$/EA</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>15.000,00 USD</td>
</tr>
<tr>
<td>Tax</td>
<td></td>
<td>0,00</td>
</tr>
</tbody>
</table>

Pricing Elements

<table>
<thead>
<tr>
<th>NL. City Name</th>
<th>Amount</th>
<th>Curr</th>
<th>per</th>
<th>U.</th>
<th>Condition value</th>
<th>Cur.</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRIC</td>
<td>3.000,00 USD</td>
<td>1 EA</td>
<td></td>
<td>15.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross Value</td>
<td>3.000,00 USD</td>
<td>1 EA</td>
<td></td>
<td>15.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discount</td>
<td>0,00</td>
<td>USD</td>
<td>1 EA</td>
<td>0,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rebate Basis</td>
<td>3.000,00 USD</td>
<td>1 EA</td>
<td></td>
<td>15.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Value for Item</td>
<td>3.000,00 USD</td>
<td>1 EA</td>
<td></td>
<td>15.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Value 2</td>
<td>3.000,00 USD</td>
<td>1 EA</td>
<td></td>
<td>15.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>3.000,00 USD</td>
<td>1 EA</td>
<td></td>
<td>15.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>STIC</td>
<td>0,00</td>
<td>USD</td>
<td></td>
<td>0,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extern prico</td>
<td>1.400,00 USD</td>
<td>1 EA</td>
<td></td>
<td>7.000,00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard - USA / With</td>
<td>1.600,00 USD</td>
<td>1 EA</td>
<td></td>
<td>0.000,00 USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This screen shows that each bicycle costs 3.000 $ and that neither discounts nor supplements were determined. It furthermore shows that GBI makes a profit of 1.600 $ per bicycle sold.
Click ☑ to return to the SAP Easy Access Menu.
**Exercise** Use the SAP Easy Access Menu in order to display an outbound delivery.  

**Task** In the context of the sales order process, after the order was created, the outbound delivery takes place. As a next step, please display the outbound delivery document.

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

To create a delivery, follow the SAP Easy Access menu path:

**Menu path**

1. **Logistics** ► **Sales and Distribution** ► **Shipping and Transportation** ►
2. **Outbound Delivery** ► **Display**

Enter **80000000** as Outbound Delivery number in order to view the document of the sales order introduced in the previous step. Click **✓** or Enter.

In the tab **Picking**, you can see that the 5 bicycles mentioned in the previous step were removed from the warehouse in Miami.

<table>
<thead>
<tr>
<th>Item</th>
<th>Material</th>
<th>Plnt</th>
<th>SLoc</th>
<th>Deliv. Qty</th>
<th>Un</th>
<th>Picked Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>DXTR1002</td>
<td>MI00</td>
<td>FG00</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>PRTR1002</td>
<td>MI00</td>
<td>FG00</td>
<td>2</td>
<td>EA</td>
<td>2</td>
</tr>
</tbody>
</table>

**Please Note:** By means of the indicator **OvrllPickStatus**, you can detect whether a picking has already been started, is partly conducted, or already finished.

In this case, the delivery quantity is already fully picked.
Click 🎧 in order to return to the SAP Easy Access Menu.
**EXERCISE** Use the SAP Easy Access Menu in order to display billing documents.

**Time** 5 Min.

**Task** After the outbound delivery of the bicycles to the customer, a billing document was created for the customer. Display the billing document in the system.

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

To display a billing document, follow the menu path:

**Menu path**

Logistics ► Sales and Distribution ► Billing ► Billing Document ► Display

Enter **90000001** as Billing document number in order to watch the billing document for the sales order examined in the previous steps. Click ✅ or Enter.

As you can see, there is a billing document that shows the costs incurred of 7.000$ plus profit. This billing document thus represents a claim for payment of 15.000$ for Beantown Bikes.

If you select the document and press ✅, you will be able to see the document from the accounting perspective and thus the accounts involved.

Click ✅ to return to the SAP Easy Access Menu.
**SD 5: Analysis Document Flow**

**Exercise** Use the SAP Easy Access Menu in order to view the Document Flow.  
**Time** 15 Min.

**Task** There are various possibilities to display the Document Flow. The SAP system offers one possibility that starts directly from the sales order document.

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

SAP provides the Document Flow tool that tracks the entire sales transaction process from beginning to end. The Document Flow tool is extremely powerful because it can be used at any point in the sales order process. It provides an audit trail (booking control) for the sales order and all follow-up documents chronologically. Furthermore, it is possible to navigate into these documents and to display them in detail (drill down).

To display the sales order, follow the menu path:

**Logistics ► Sales and Distribution ► Sales ► Order ► Display**

Make sure that 1 is entered as order number.

**Display Sales Order: Initial Screen**

<table>
<thead>
<tr>
<th>Sales</th>
<th>Item overview</th>
<th>Ordering party</th>
<th>Orders</th>
</tr>
</thead>
</table>

**Please note:** If you log out of the SAP system after having created an order, the document number is not recorded automatically. You can search for the order number by selecting the tab *Sales Documents by Customer*. Enter **UE00** as Sales organization and **Z998** as Purchase Order Number.
To access the supporting document, click (Display Document Flow) or follow the pull-down menu path:

**Environment ➤ Display document flow**

The Document Flow for the sales order of Beantown Bikes should look as follows:
EXERCISE

The Document Flow guarantees access to each document.

As an example, in order to display the invoice, click the invoice line and press Display document afterwards. The following screen should come up:

In order to access invoice details, follow the menu path:

Goto Header Header

This will produce the following screen:
Please watch the invoice details or click 📊 to return to the document flow. Investigate the other documents and use 📊 twice to return to the SAP Easy Access screen.