LAB 2: Customer Order Management Overview
2-1: Organizational and Master Data

In these exercises you:

- Examine a customer master record.
- Examine a material master record.

2-1.1. Examine a customer master record using the data specified. This exercise will take you through each screen so you can review the data found on each.

Menu Path:

   Logistics → Sales and distribution → Master data → Business partners → Customer → Display → Complete

Enter the following data:

Customer Change: Initial Screen

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>2300</td>
</tr>
<tr>
<td>Company Code</td>
<td>1000</td>
</tr>
<tr>
<td>Sales organization</td>
<td>1000</td>
</tr>
<tr>
<td>Distribution channel</td>
<td>12</td>
</tr>
<tr>
<td>Division</td>
<td>00</td>
</tr>
</tbody>
</table>

Go to the General data: Address screen.

What is the name of the customer? _____________________________
What is the Language of communication? _________________________
What is the telephone number? _________________________________

Go to the General data: Control data screen.

What is the VAT number? ________________________________

Similarly go to the other screens in the General data and observe the various data entered for the customer.
Go to the *Company Code Data: Account Management* screen.

What is the Reconciliation Account no? _______________________
What do you mean by the Reconciliation Account no?

(Hint: Click on question mark icon in the standard toolbar)

Go to the *Company Code Data: Payment Transactions* screen

What is the Terms of Payment? _______________________________

Similarly go to the other screens in the *Company Code data* and *Sales Area Data* and observe the various data entered for the customer.

Exit the *Change Customer* screen **without** saving the data.
2-1.2. Examine a **material master record** with the data provided below. This exercise will take you through each screen so you can review the data found on each.

**Menu Path:**

*Logistics → Material management → Material master → Material → Display → Display Current*

**Enter** the following data:

**Change Material: Initial Screen**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material</td>
<td>T-TR901</td>
</tr>
</tbody>
</table>

Select the *Enter* icon to continue.

On the pop up screen, choose all the views by using the *Select all* icon, then select the *Enter* icon.

**Organizational Levels**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plant</td>
<td>1000</td>
</tr>
<tr>
<td>Storage Location</td>
<td>0001</td>
</tr>
<tr>
<td>Sales org.</td>
<td>1000</td>
</tr>
<tr>
<td>Distr. channel</td>
<td>12</td>
</tr>
</tbody>
</table>

Select the *Enter* icon to continue.

**Change Material T-TR901 (Finished Product)**

Go to the **Basic Data 1** screen.

What is the base unit of measure? __________________________________________

What is the gross weight of the product? ________________________________

Go to the **Sales: Sales org. 1** screen.

What is the tax classification for the product? ____________________________

What are the various tax classifications possible?

__________________________________________________________

(Hint: Click on the adjacent column)

Go to the **MRP 1** screen.
What is the MRP type? _______________________________________
What is the Planning time fence? ________________________________
What do you mean by Planning time fence? ________________________
(Hint: Click on question mark icon in the standard toolbar.)

Go to the MRP 2 screen.

What is the Procurement type? _________________________________

Go to the Forecasting screen.

What is the forecasting model used? ____________________________

Go to the Accounting 1 screen.

What is the Standard price of the product? ______________________
What is the currency? _________________________________________

Similarly go to the other screens and observe the various data entered for the customer.

Exit the Change Material screen without saving the data.
Lab 2: Customer Order Management  
2-2: Business Process for Customer Order Management

In these exercises you:

- Examine a standard sales order.
- Examine a delivery for the sales order.
- Examine the picking of the product by processing a transfer order for the delivery.
- Examine the posting of a goods issue for the delivery.
- Examine an invoice for the delivery.
- Examine the posting of a customer payment to the invoice.
- Display the document flow throughout the COM process activities above.

2-2.1  One of your customers calls to place an order for television parts. Examine a sales order based on the information provided below.

Menu Path:

*Logistics → Sales and distribution → Sales → Order → Display*

Enter the following data:

**Change Sales Order: Initial Screen**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>4970</td>
</tr>
</tbody>
</table>

Select the *Enter* icon to continue. Acknowledge the information by selecting *Enter* icon again.

**Change Standard Order 4970: Overview**

Fill in the material details (of the sales order considered) in the table below:

<table>
<thead>
<tr>
<th>Material</th>
<th>Order Quantity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2-2.2 Display the sales order and record the confirmed delivery date and pricing information for the first item (Sony Sunny01)

To display the delivery-related dates for a line item, first click the button directly on the left of the item number (say, item number 10). This should highlight the line.

Next, click on the Schedule lines for item icon at the bottom of the screen.

Then, click on the Sched. line-detail icon at the lower left of the schedule line (first on the left).

Finally, click on the Shipping tab and record the dates below:

- Delivery date: __________________________________________
- Goods issue date: ________________________________________
- Loading date: ____________________________________________
- Material available: ________________________________________
- Transportation planning date: ______________________________
- Shipping point: __________________________________________

To display the pricing, go back to the two-previous screen and click on Display Item Details icon at the bottom left of the screen.
2-2.3 Once the order has been completed, the delivery process can begin. Examine the delivery for the sales order.

Menu Path:

(Logistics → Sales and distribution → Shipping and Transportation → Outbound Delivery → Display)

Field Name    Input Data
Outbound Delivery  80003371

The delivery document can be created using this menu. Critical shipping information is copied from the sales order. This cannot be implemented right now. The next step in the delivery process is picking the item. A transfer order is created to facilitate the picking. The picking is done using the following menu path:

Menu Path:

(Logistics → Sales and Distribution → Shipping and Transportation → Picking → Display Transfer Order → Single Document)

(We are not able to do this. It asks for Transfer Order no and Warehouse number. We are not able to find the warehouse for the corresponding transfer order number. The transfer order no. was got from the Document Flow (this is the display of the sales order))

Once the picking is done, the documentation of the packaging of the product needs to be done. But this is optional. As a result, we will skip this step and proceed to the next step, which is the Posting of Goods Issue. This step confirms that the goods have left the warehouse. The inventory balances are automatically updated and the appropriate entries are made in the general ledger. The delivery is also flagged as ready for billing.

Menu Path:

(Logistics → Sales and Distribution → Shipping and Transportation → Post Goods Issue → Outb. Delivery Single Doc.)

Field Name    Input Data
Outbound Delivery  80003371

Click on the Post Goods Issue icon.

What is the message that you see? __________________________ (error message)
After the product has been shipped, the delivery becomes “eligible for billing”. Examine the invoice for the delivery and record the net value of the invoice.

Menu Path:

*Logistics → Sales and Distribution → Billing → Billing Document → Change*

**Change Billing Document**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Document</td>
<td>90005197</td>
</tr>
</tbody>
</table>

Fill in the table below

<table>
<thead>
<tr>
<th>Material</th>
<th>Net Value</th>
<th>Cost</th>
<th>Tax Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What is the net value of the invoice? _________________________

Go back to the previous screen and then go to *Billing Document* (in the menu bar) → *Issue Output to → Screen*.

At the first dialog box, verify that the Output type is *RD00* and select *Execute*. In the second dialog box, enter the logical destination as *LP01* and *Execute* again.

What is the final amount of the invoice? ____________________________

(Hint: Look for the final amount in the second page of the invoice.)

Since the process is complete, the complete document flow can be seen.

Menu Path:

*Logistics → Sales and Distribution → Sales → Order → Display → [enter the order number] → Environment → Display Document flow*

Observe the complete document flow. The graphic representation of this flow can be seen using the *Graphic icon*. 
Lab 2: Customer Order Management
2-4: Reporting and Analysis

In these exercises you:

- Generate a customer name and address list using standard reporting tools.
- Generate a list of all sales orders for a customer using list processing tools.
- Perform a standard customer analysis using the SIS.
- Add a key figure to the standard customer analysis.

2-4.1 Several departments use customer and sales document information. In this exercise you will verify that the system supports IDES’s routine reporting requirements. Prepare a customer name and address list using the selection criteria below.

Menu Path:

*System → Services → Reporting*

Enter the following data:

**ABAP: Execute Program**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>RFDKVZ00</td>
</tr>
</tbody>
</table>

Select the *Execute* icon.

Enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Code</td>
<td>1000</td>
</tr>
<tr>
<td>Address and Telecom(master)</td>
<td>Selected</td>
</tr>
</tbody>
</table>

Select the *Execute* icon.
Search for the customers in the Organizational and Master Data topic exercises.

Menu Path:

*Edit → Find.*

Enter the term **WB100**.

Examine the address for the customer by double-clicking on it.
2-4.2 You need to compile a list of all sales orders for a particular customer over a specified period of time. Create the list using the specified display variant below, then drill down on one of the orders to review the document flow and status.

**Menu Path:**

*Logistics → Sales and distribution → Sales → Information system → Orders → List of Sales Orders*

**List of Sales Orders**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sold-to party</td>
<td>1175</td>
</tr>
<tr>
<td>Document date</td>
<td>01/01/1997 to today’s date</td>
</tr>
</tbody>
</table>

Select the Enter icon.

Sort the sales orders by date by clicking in the ‘Doc.date’ column header. Select the *Sort in ascending order* button.

The list will then be sorted beginning with the oldest order on top.

Find order 4970 and double-click on any field of that order.

Select the Continue Enter icon on the information pop-up dialog.

From the ‘Change Standard Order 4970: Overview’ screen, select the Display document flow button. Observe the overall processing status of each document associated with this sales order.

This has already been displayed. But this is a different way to get to the same point. Would you like them to display the same thing again?
2-4.3 Review customer sales history for your sales organization by performing a standard customer analysis. Create a list of your top 10 customers according to invoiced sales, then graphically view the information for one of them during the specified period.

Menu Path:

*Logistics → Sales and distribution → Sales information system → Standard analyses → Customer*

**Customer Analysis: Selection**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sold-to party</td>
<td>blank</td>
</tr>
<tr>
<td>Material</td>
<td>blank</td>
</tr>
<tr>
<td>Sales organization</td>
<td>1000</td>
</tr>
<tr>
<td>Distribution channel</td>
<td>blank</td>
</tr>
<tr>
<td>Division</td>
<td>blank</td>
</tr>
<tr>
<td>Period to analyze</td>
<td>01/1997 to today’s month/year</td>
</tr>
</tbody>
</table>

Select the **Execute** icon.

Click the ‘**Sales**’ key figure column header.

Select the **Top N...** button.

Verify ‘**10**’ in the ‘**number**’ field and select **Enter**. The list now reflects your top 10 customers based on invoiced sales during the specified period.

You can view a list of the monthly invoiced sales for a particular customer. Select the company “**Carbor GmbH**” from the list by double clicking it on the ‘**sold-to party**’ column.

View this information graphically by clicking on the ‘**Graphics**’ icon on the toolbar.

**Graphic: Choose Key figures**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incoming orders</td>
<td>de-select</td>
</tr>
<tr>
<td>Sales</td>
<td>select</td>
</tr>
<tr>
<td>Credit memos</td>
<td>de-select</td>
</tr>
</tbody>
</table>

Select the **Continue Enter** icon to execute the SAP Business Graphics.

Maximize the window to better view the graphic.
2-4.4 Run a customer analysis and change the settings to display the customer number and name. Record the value of incoming orders for your customer number. Add a key figure (Invoiced Quantity) to the standard analysis and record the number of units invoiced for the specified customer.

Menu Path:

*Logistics → Sales and distribution → Sales information system → Standard analyses → Customer*

**Customer Analysis: Selection**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Input Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sold-to party</td>
<td>1175</td>
</tr>
<tr>
<td>Material</td>
<td>leave blank</td>
</tr>
<tr>
<td>Period to analyze</td>
<td>01/1997 to today’s month/year</td>
</tr>
</tbody>
</table>

Select **Execute** icon.

Use the following path to change the setting to display both customer number and name.

You can view the sold-to party by the assigned customer number (key), name (description), or both.

Menu Path:

*Settings → Characteristic display → Key and description*

Select the following menu path to add a key figure to your report.

Menu Path:

*Edit → Choose key figures…*

The system displays a window indicating the key figures that are already existing on your report and a list on the right side of the window of available key figure.

To add the Invoiced quantity key figure, scroll down the “ALL” key figure list on the right side until you find the ‘invoiced quantity’ line.

Select the box to the left of that field and then click on the single arrow pointing to the left to add the key figure to the report.

Select the **Continue Enter** icon.
The system displays the report with the additional field **Invoiced Quantity**.

Write down the Invoiced Quantity amount for the specified period.
Invoiced qty:________________________. 