MIS2101

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FALL 2013

This document is a PDF version of the SAP Sales activity taken straight from the Kroenke book. Students _DO NOT_ need to go into the book or MyMISLAB in order to complete the SAP project.

This tutorial follows the Sales process shown in Figure 8A-1. The top of this diagram appears in Chapter 8 as Figure 8-3. This top figure shows the three main Sales activities—Sell, Ship, and Payment, and the subactivities (Create Sales Order, etc.). At the bottom of Figure 8A-1, we have added the eight steps included in this tutorial. To keep this tutorial simple, we begin with step 3, Create a Sales Order.
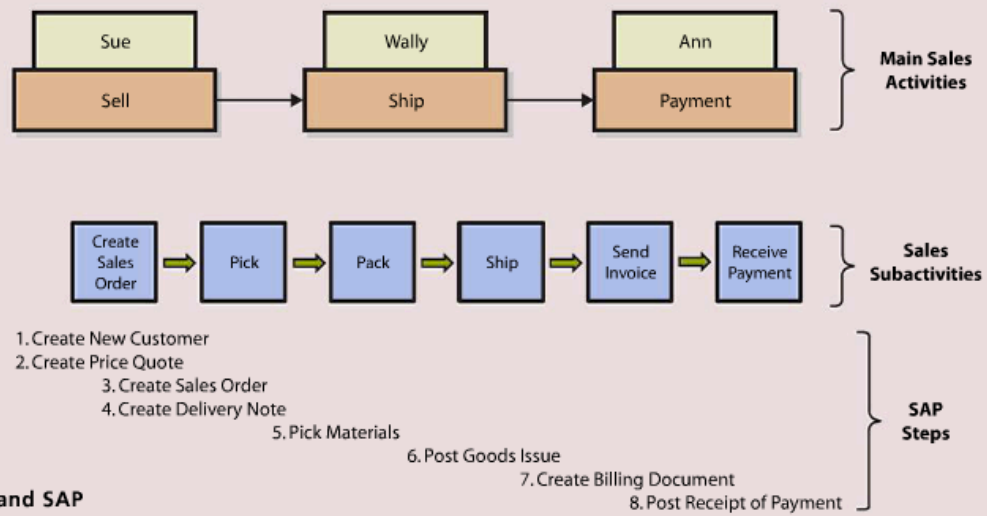
FIGURE 8A-1

Sales Process and SAP Steps

First Exercise

In this first exercise, we will sell five black Deluxe Touring bicycles to Philly Bikes. While our company in this tutorial is Global Bike, Inc., our actors—Sue, Wally, and Ann—and our Sales process are from Chuck's Bikes. Log in using data provided by your instructor (see Figure 7A-2).

1 Create New Customer

Skipped—does not apply to this first exercise, it is introduced later.

2 Create Price Quote

Skipped—does not apply to this first exercise, it is introduced later.

3 Create Sales Order

This first step, creating a sales order, is accomplished by a salesperson, at CBI, this is Sue. From the SAP Easy Access screen (Figure 8A-2), navigate to the Sales Order page by selecting:

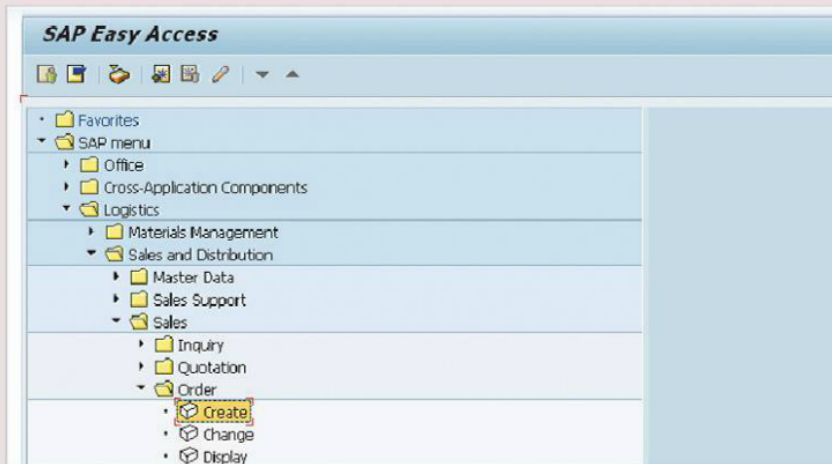*Logistics > Sales and Distribution > Sales > Order > Create*

FIGURE 8A-2

SAP Easy Access Screen

When you double-click Create, the next screen to appear is the Create Sales Order: Initial screen (Figure 8A-3). As in the tutorial in Chapter 7, the last two digits in Sales Organization in Figure 8A-3 are zeros, not the letter "O."
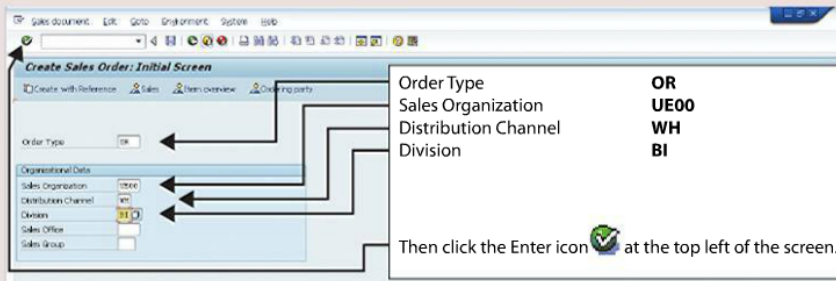

FIGURE 8A-3

Create Sales Order: Initial Screen

Order Type	OR
Sales Organization	UE00
Distribution Channel	WH
Division	BI

Then click the Enter icon ✓ at the top left of the screen.

The next screen to appear is the Create Standard Order: Overview screen (Figure 8A-4). This screen may look familiar; it is Figure 8.9 from Chapter 8.

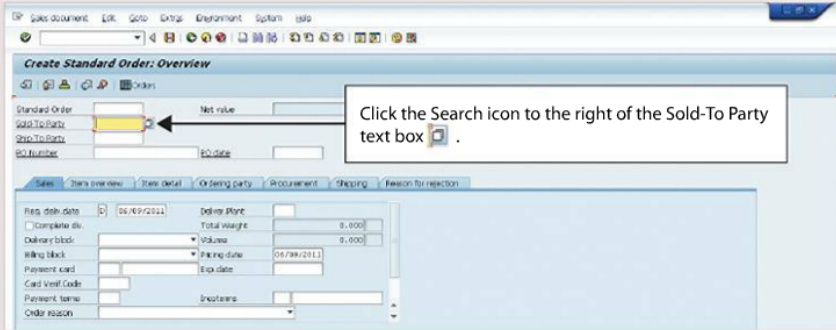Click the Search icon to the right of the Sold-To Party text box ⬚ .

This will produce the pop-up search window shown in Figure 8A-5.

Search using the Customers (general) tab. If that tab is not already selected, click the Display

List icon ⬚ (third on the right). Then select the Customers (general) choice, as shown.

Enter your User Number ### in the Search term text box, then click the Search icon ✔ .
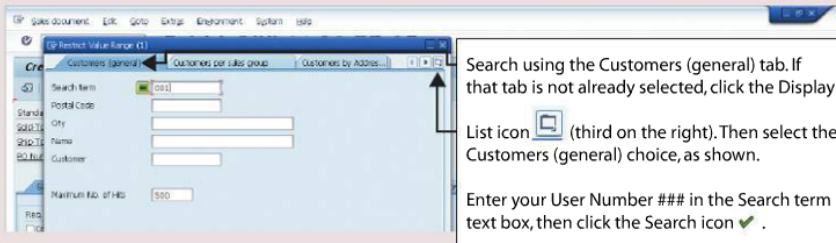
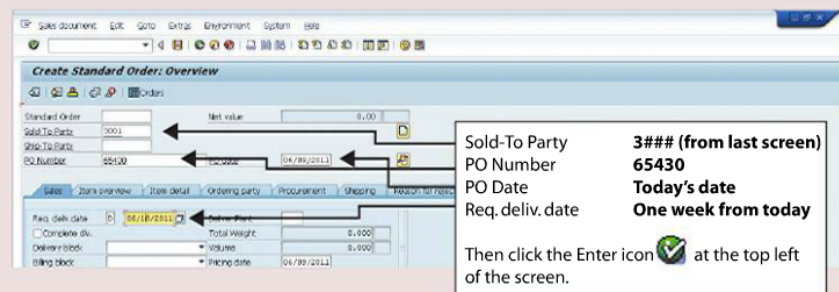A list of potential customers is shown (Figure 8A-6).

Double-click Philly Bikes.
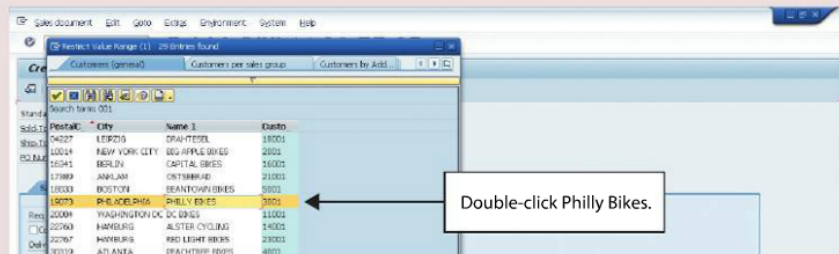
After you select Philly Bikes, you are returned to the Create Standard Order: Overview screen (Figure 8A-7). Notice that the Philly Bikes ID number appears in the Sold-To Party box. The PO number (65430 in this exercise) was specified by Philly Bikes and included in the sales order to provide the link between their purchase order and our sales order.

Sold-To Party	3### (from last screen)
PO Number	65430
PO Date	Today's date
Req. deliv. date	One week from today

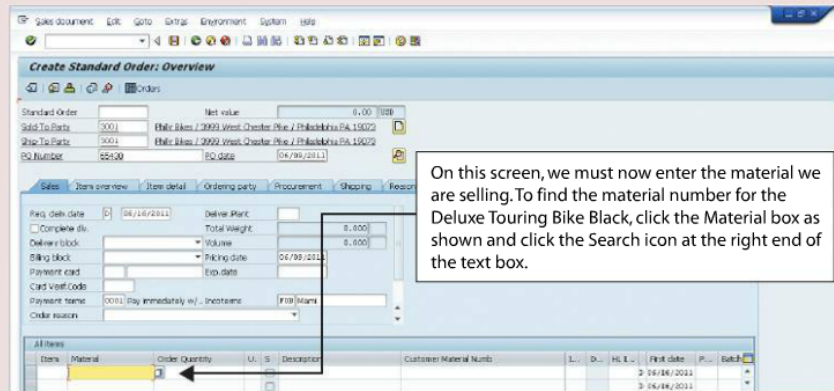Then click the Enter icon ✅ at the top left of the screen.

Click the Enter icon, and a warning pop-up window is displayed (Figure 8A-8).

FIGURE 8A-8

Pop-up Warning Screen
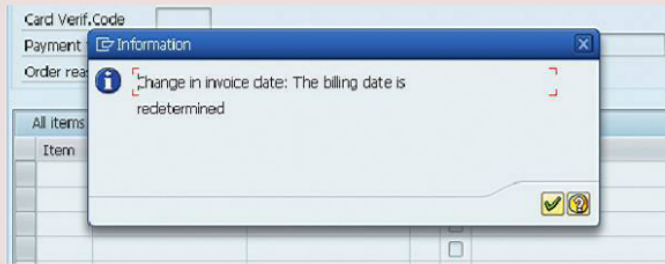
Click the Enter icon to continue. The system retrieves data about the Philly Bikes customer and displays an updated Create Standard Order: Overview screen (Figure 8A-9).

FIGURE 8A-9

Create Standard Order: Overview Screen

On this screen, we must now enter the material we are selling. To find the material number for the Deluxe Touring Bike Black, click the Material box as shown and click the Search icon at the right end of the text box.

This will load the material search pop-up screen (Figure 8A-10).

Click the search option icon (third on the right) then when the drop-down box appears click Sales Material by Description at the bottom of the list.
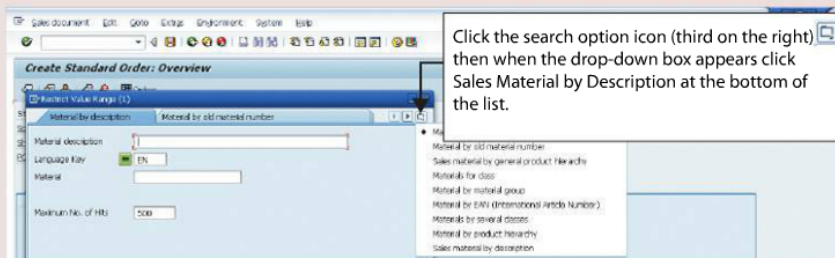
FIGURE 8A-10

Material Search Screen

This will reload a new search pop-up screen (Figure 8A-11).
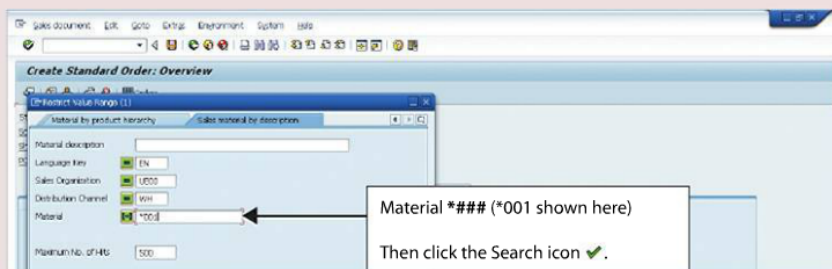
FIGURE 8A-11

Material Search Screen

Material *### (*001 shown here)

Then click the Search icon ✔.

This will show you the sales material you can sell (Figure 8A-12).

FIGURE 8A-12

Material List Screen

Double-click Deluxe Touring Bike (Black).
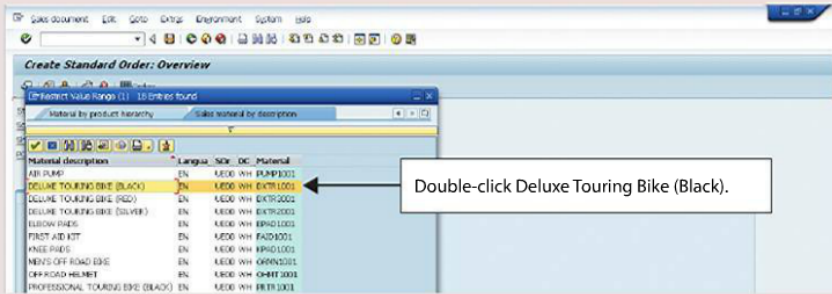
This returns you to the Create Standard Order: Overview screen. The material number for the Deluxe Touring Bike (Black) is now displayed in the Material column (Figure 8A-13).
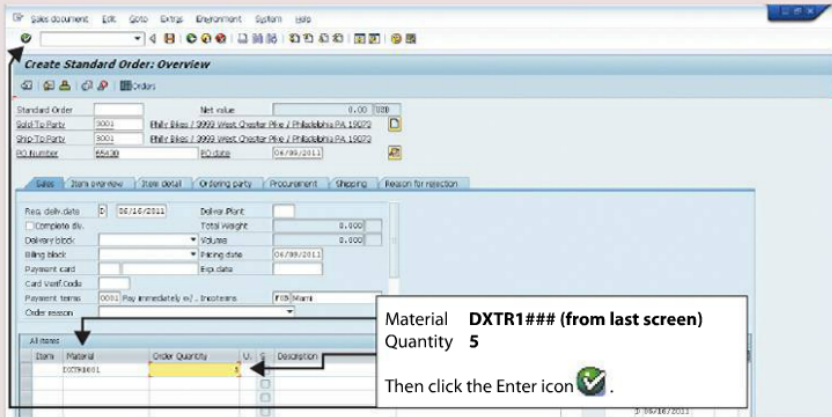

FIGURE 8A-13

Create Standard Order: Overview Screen

Material   **DXTR1### (from last screen)**

Quantity   **5**

Then click the Enter icon ✓.

The system will check availability and retrieve Item Number, Total Weight, Net Value, and other data to complete your sales order, as shown in Figure 8A-14.

FIGURE 8A-14

Create Standard Order: Overview Screen

Click the Save icon 🖫 to save the Sales Order.

FIGURE 8A-15

Standard Order Number Screen
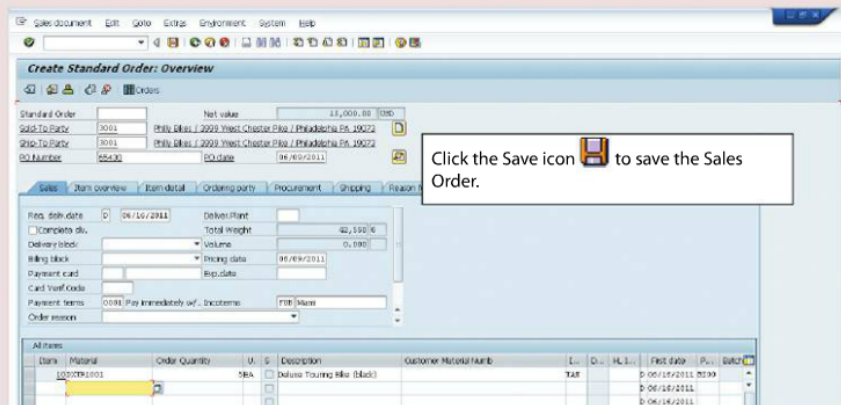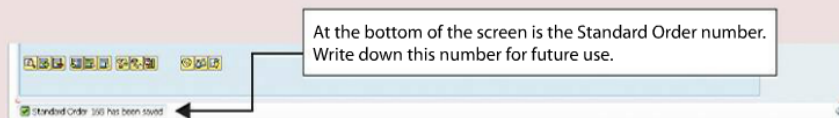

At the bottom of the screen is the Standard Order number. Write down this number for future use.

The sales order is now complete. To return to the SAP Easy Access Screen click on the exit icon as shown in Figure 8A-16.

FIGURE 8A-16

Toolbar Screen

Return to the SAP Easy Access screen by clicking the Exit icon.

The Easy Access Screen can be returned to its original structure by clicking on the SAP Menu icon (Figure 8A-17).

FIGURE 8A-17

Easy Access Screen

Once you have returned to the SAP Easy Access menu, return the menu to its original form by clicking the icon.
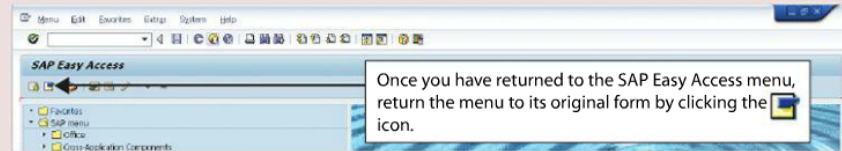
4 Create Delivery Note

To initiate the series of warehouse activities—Pick and Ship (called Post in SAP)—we must first create a Delivery Note. This is the second and last step accomplished by a salesperson. From the SAP Easy Access screen, navigate to the Create Outbound Delivery with Order Reference screen by selecting:

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

When the Create Outbound Delivery with Order Reference screen appears (Figure 8A-18), the Order number should automatically load, and it should correspond to the number you just created in the Sales Order step. Note that our Shipping point is our Miami plant, and the second digit is the letter "I," not the number 1.

Shipping point **MI00**
Selection date **One week from today**
Order **Your sales order number (165 shown here)**
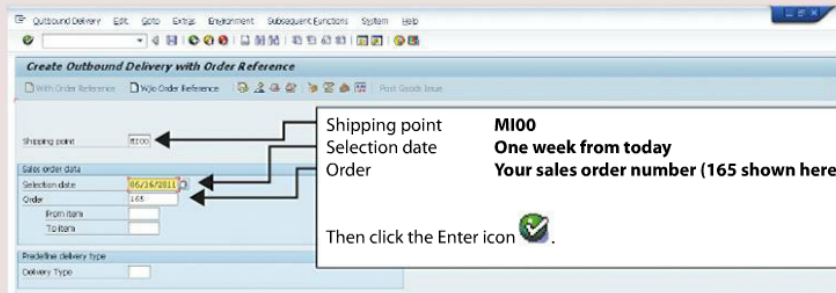
Then click the Enter icon.

FIGURE 8A-18

Create Outbound Delivery Screen

The Create Outbound Delivery screen is displayed containing the data from the sales order (Figure 8A-19).

Click the Save icon.

FIGURE 8A-19

Create Outbound Delivery Screen

By saving the document, the SAP system ensures that the material is available and can meet the specified delivery date. The SAP system assigns a unique number to this delivery document and displays it at the lower-left corner of the Status bar (Figure 8A-20).
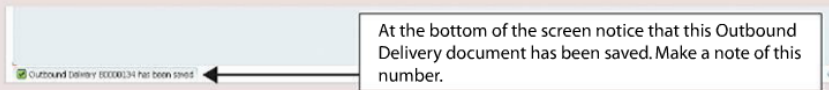
At the bottom of the screen notice that this Outbound Delivery document has been saved. Make a note of this number.

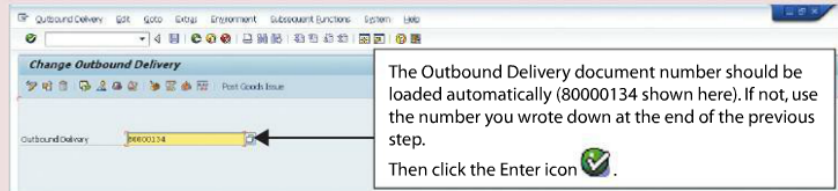**Outbound Delivery Number Screen**

Return to the SAP Easy Access screen by clicking the Exit icon.

5 Pick Materials

Logistics > Sales and Distribution > Shipping and Transportation > Outbound Delivery > Change > Single Document

When a sales order is picked, the material is moved from its storage location and moved to its packing area. This picking step and the next step, posting, is accomplished by the warehouse manager, at CBI this is Wally. To do this, we must change the delivery document. The first screen in this step is the Change Outbound Delivery screen (Figure 8A-21).

FIGURE 8A-21

Change Outbound Delivery Screen

The Outbound Delivery document number should be loaded automatically (80000134 shown here). If not, use the number you wrote down at the end of the previous step.

Then click the Enter icon.

The Outbound Delivery Change: Overview screen will appear (it is very similar to the Outbound Delivery Create: Overview screen in the previous step). Notice in the item detail section that the Item Overview tab has been selected (Figure 8A-22).

FIGURE 8A-22

Outbound Delivery Change Screen

Click the Picking tab.

On this screen, Storage location (SLoc) may appear as a very narrow column with its visible heading shortened as "S . . ." (Figure 8A-23).
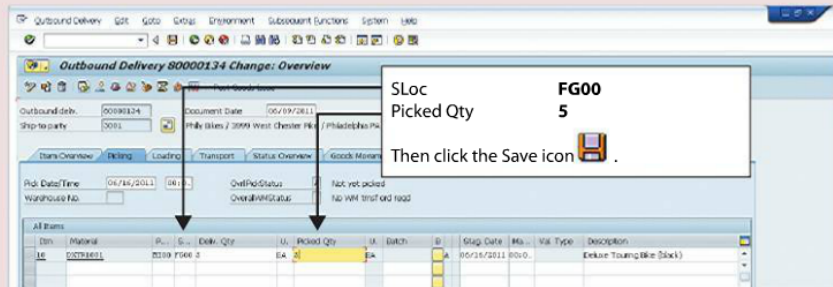
Again, a message in the Status bar appears that confirms that the outbound delivery document is once again saved. It is the same document number you created in step 4. Return to the SAP Easy Access screen by clicking the Exit icon.

6 Post Goods Issue

Logistics > Sales and Distribution > Shipping and Transportation > Outbound Delivery > Change > Single Document

When posting occurs, possession of the material transfers from Global Bike to Philly and inventory at Global Bike is reduced. Legal ownership of the material also changes hands. The first screen that appears in this step, Change Outbound Delivery (Figure 8A-24), is the same as the first and last screen in the previous step (Figure 8A-21).
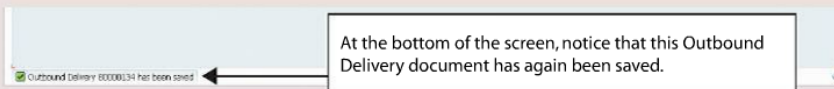
FIGURE 8A-24

**Change Outbound
Delivery Screen**
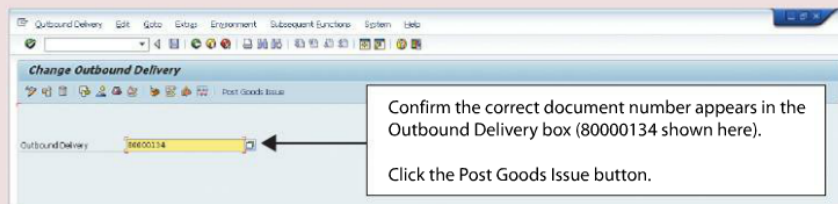
FIGURE 8A-25

**Outbound Delivery
Number Screen**

Return to the SAP Easy Access screen by clicking the Exit icon.

7 Create Billing Document for Customer

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

This step creates an invoice for the bikes that have been shipped. This invoice is sent to the customer. This step, and the final step, posting receipt of the payment, is done by an accountant, at CBI this is accomplished by Ann. The first screen is the Maintain Billing Due List screen (Figures 8A-26).

Click the Collective Billing Document icon, and the background color of this row will disappear.

This completes the Billing step, you do not need to click Enter or Save. Return to the SAP Easy Access screen by clicking the Exit icon twice.

8 Post Receipt of Customer Payment

Accounting > Financial Accounting > Accountants Receivable > Document Entry > Incoming Payments

In the previous step, we sent Philly Bikes a bill. It has now sent us a $15,000 payment. In this step, we record receipt of that payment. The first screen is the Post Incoming Payments: Header Data screen (Figure 8A-29).

FIGURE 8A-29
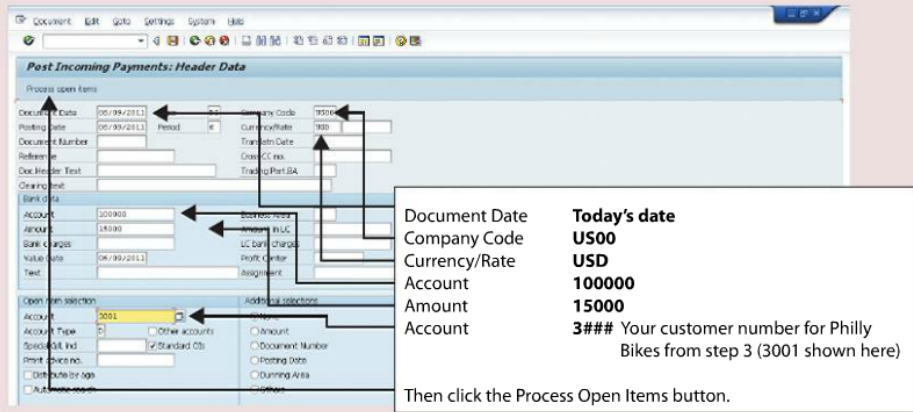
Post Incoming Payments Screen

Document Date	**Today's date**
Company Code	**US00**
Currency/Rate	**USD**
Account	**100000**
Amount	**15000**
Account	**3###** Your customer number for Philly Bikes from step 3 (3001 shown here)

Then click the Process Open Items button.

FIGURE 8A-30

Post Incoming Payments Process Open Items Screen

The Not assigned value should be 0.00, as shown.

If yours is not 0.00, then double-click the 15,000.00 to assign this payment to the bill.

Then click the Save icon.

FIGURE 8A-31

Payment Document Screen

Again, the system creates a unique document number at the bottom.
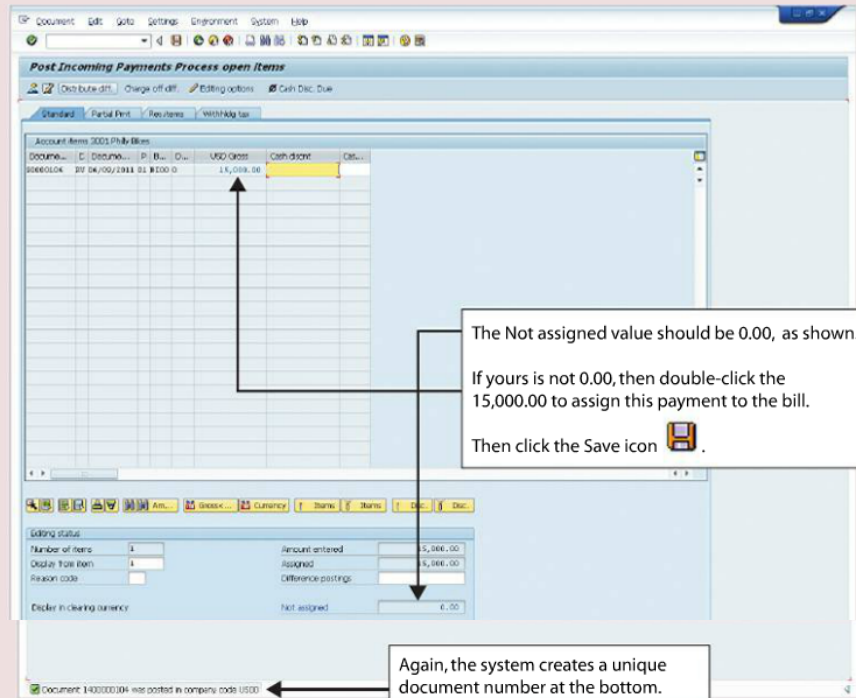
Return to the SAP Easy Access screen by clicking the Exit icon. This will generate a pop-up window that is misleading (Figure 8A-32). There is no data to be lost at this point, so click Yes. You are finished with the first exercise.