

SAP SD Configuration Pack

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A Warm Welcome Friends. I am really excited to be presenting to you the SD configuration pack. This was a much awaited configuration pack and I am sure you will benefit a lot from this content rich pack.

There are lots of information we have covered and you will also find the various special process like Credit Management, Free Goods, Intercom any billing, Payment Cards, Third Party processing etc in CD 6.

SD module has always been slated as a complex module and the pricing procedures have always made even the best of SAP consultants sweat but having made the wise decision of investing in this pack you need not worry any more...

We have tried to put the entire configuration, end user and presentations it in a step-by-step, simple yet very detailed and comprehensive manner. There are lots of folders, sub folders you will find in here so go through it ,take your time do not jump into the whole thing. Take one at a time and absorb each one completely.

The whole intention of this pack is to make your life at the project place comfortable with less hassles. So once again I thank for showing confidence in our packs and I wish you great success and terrific prosperity in your SAP career. God bless and thank you

Vish

1. Enterprise structure – SD - Definition

1.1 Define Sales organization

BACKGROUND

Sales organization is the basic organizational element in SD. All sales documents are created for a sales organization. Sales organization can be defined based on

- Division of sales function of the company based on
- Geography or sub-businesses of the company
- Any other sales criteria.

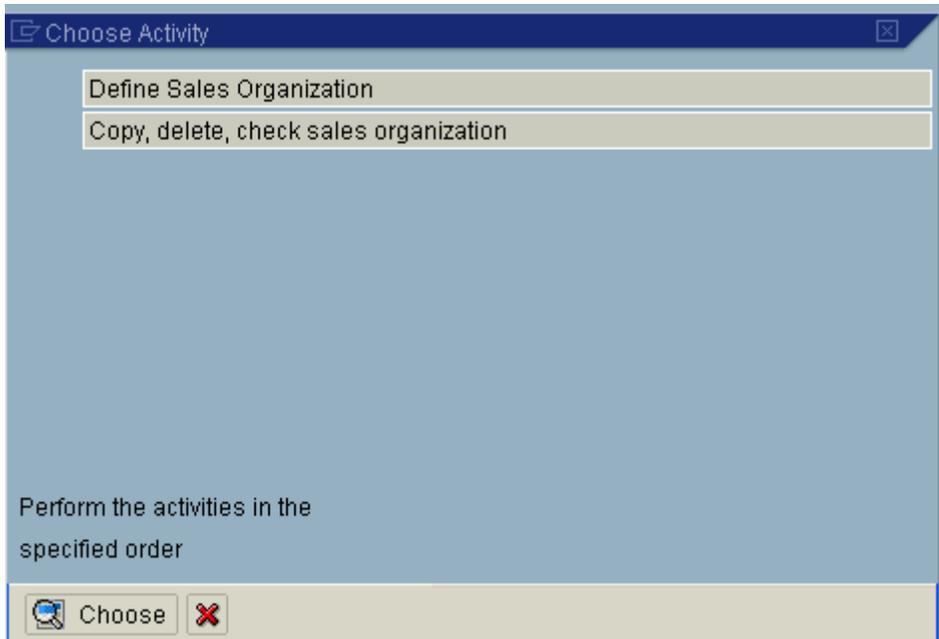
Sales organization is defined as a 4-digit alpha numeric code with external numbering

Instructions

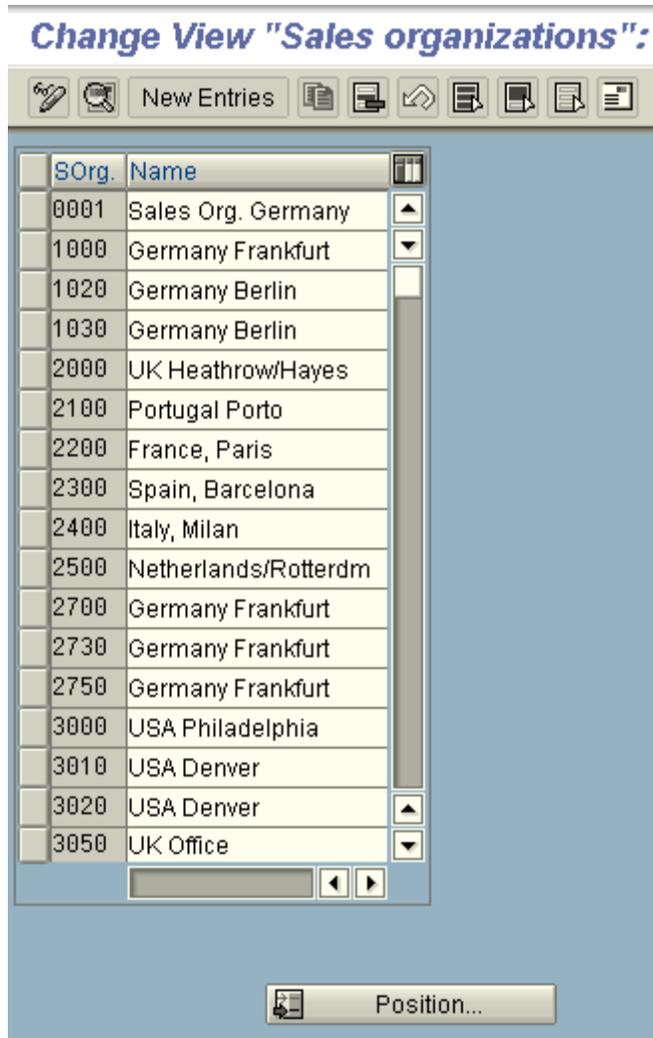
Follow Menu Path: IMG → Enterprise structure → Definition → Sales and Distribution → Define, copy, delete, check sales organization

Click 

Following pop-up is displayed

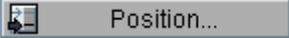


Click on “define sales organization” and click on 



Here the three options explained in background are applicable.

- If existing Sales organization is to be modified, choose the Sales organization from list and click on  to get into details
- For copying existing Sales organization to new one select the Sales organization to be copied and click on .
- For creating a new Sales organization click on 

Here we will follow option 'a' and select Sales organization 3020 and click on . To search for Sales organization, click on  and enter the key.



Following screen is displayed

Display View "Sales organizations": Details

Sales Organization: 3020 USA Denver

Detailed information

Statistics currency	USD	RefSorg.SalesDocType	3000
Address text name	ADRS_SENDER	Cust.inter-co.bill.	30000
Letter header text	ADRS_HEADER	Sales org.calendar	
Footer lines text	ADRS_FOOTER		
Greeting text name	ADRS_SIGNATURE		
Text SDS sender		<input checked="" type="checkbox"/> Rebate proc.active	

ALE : Data for purchase order

Purch. Organization		Plant	
Purchasing group		Storage location	
Vendor		Movement Type	
Order type			

Maintain Key controls as below

Field Name	Field Description and Value
Sales organization	4-character key for the Sales organization. Description is next to it
Statistics currency	Currency is proposed as default currency when statistics is generated for the sales organization
Reference Sorg. Sales Doc Type	All document types assigned to the reference sales organization, 3000 are also allowed for sales organization, 3020
Customer Inter-company billing	When the sales organization is the ordering sales organization in a inter-company sales scenario, then the customer assigned here is the inter-company customer
Sales organization calendar	This is working day calendar for the sales organization
Text	It is a standard text, which can be called in layouts used for order confirmation outputs



Click on the “Address” icon and maintain address as shown below.

Display address: 3020

Name

Title:

Name: Sales Organization Denver

Search terms

Search term 1/2: US

Street address

Street/House number:

Postal Code/City: 75896 Denver

Country: US United States Region: CO Colorado

PO box address

PO Box:

Postal Code:

Company postal code:

Communication

Language: English

Telephone: Extension:

Mobile Phone:

Fax: Extension:

E-Mail:

Standard Comm.Method:

Comments

1.2 Define Distribution channel

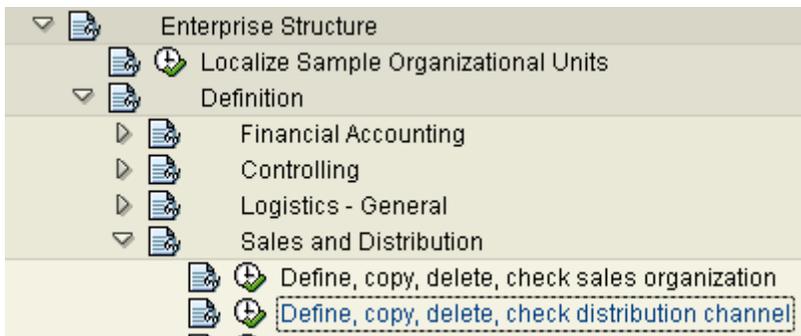
BACKGROUND

This configuration setting enables to define distribution channel.

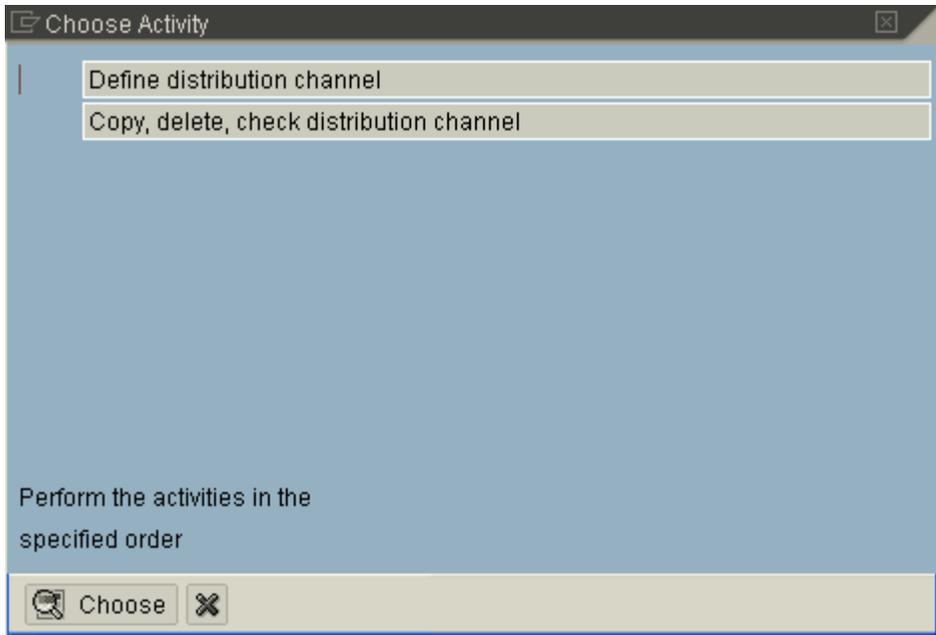
Distribution channel represents the way goods are distributed to the customers. Examples of distribution channel are retail, wholesale, direct.

Instructions

Follow Menu Path: IMG → Enterprise structure → Definition → Sales and Distribution → Define, copy, delete, check distribution channel



Click  Define, copy, delete, check distribution channel



Double click on “Define distribution channel”

Display View "Distribution channels": Overview

Distr. Channel	Name
10	Final customer sales
11	Direct Sales

As seen, distribution channel is just a code created in configuration.

1.3 Define Sales office

BACKGROUND

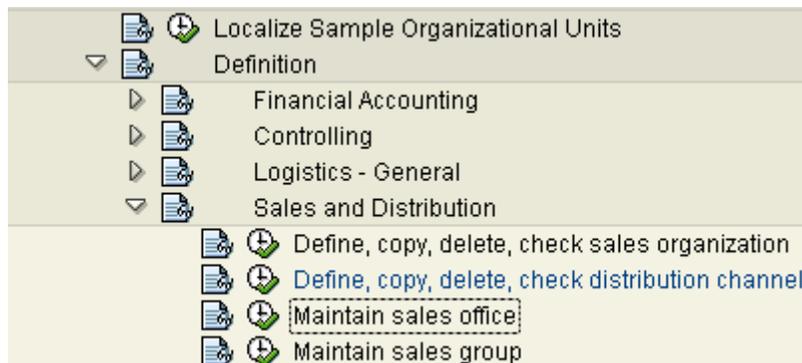
This configuration setting enables to define sales office.

Sales office of a company is an office, which has sales persons associated with it. Sales office has an address.

One sales office can be assigned to more than one sales area.

Instructions

Follow Menu Path: IMG → Enterprise structure → Definition → Sales and Distribution → Maintain sales office



Click on  Maintain sales office

Display View "Sales offices":

Sales offi...	Description
3020	Office Denver
3030	Office San Diego

Click on



Display address: 3020

Name	
Title	<input type="text"/>
Name	Sales office Denver
	<input type="text"/>

Search terms	
Search term 1/2	USA
	<input type="text"/>

Street address	
Street/House number	<input type="text"/>
Postal Code/City	78569 Denver
Country	US United States
Region	CO Colorado

PO box address	
PO Box	<input type="text"/>
Postal Code	<input type="text"/>
Company postal code	<input type="text"/>

Communication	
Language	English
Telephone	<input type="text"/>
Mobile Phone	<input type="text"/>
Fax	<input type="text"/>
E-Mail	<input type="text"/>
Standard Comm.Method	<input type="text"/>

Other communication...	
Extension	<input type="text"/>
	<input type="text"/>
Extension	<input type="text"/>
	<input type="text"/>

Comments

1.4 Define Sales group

BACKGROUND

Sales group is group of sales persons responsible for sales items in a sales order.

Sales group is determined in the sales order as per customer master, sales area data or it can be maintained manually

Sales group is not a mandatory configuration. Sales order processing can work without sales group configuration.

Sales group can be assigned to more than one sales office.

Instructions

Follow Menu Path: IMG → Enterprise structure → Definition → Sales and Distribution → Maintain sales group



Click  Maintain sales group

Change View "Sales Groups": Overview

New Entries

Sales group	Description
321	Group D1
322	Group D2

It is just a code defined.

2 Enterprise Structure – SD – Assignments

BACKGROUND

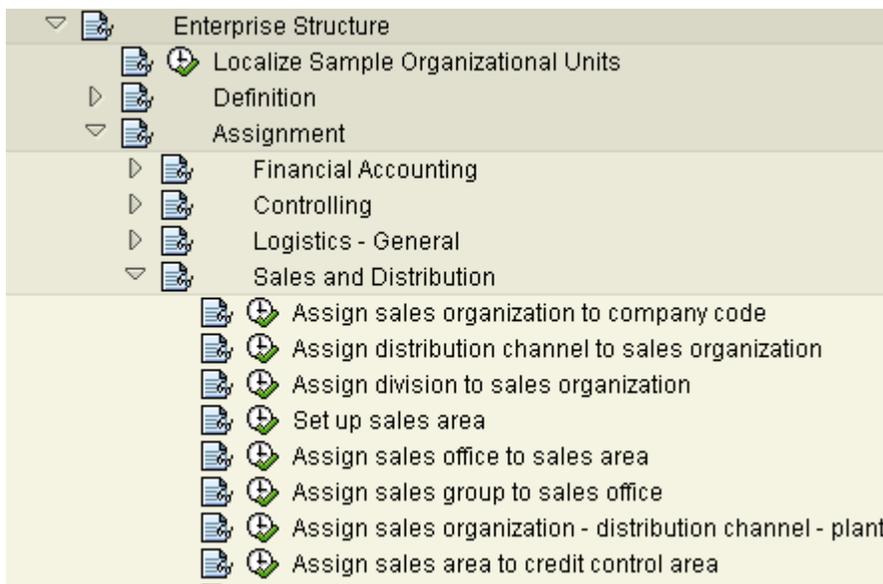
This configuration setting enables to define Assignment of sales organization.

Once all Sales and Distribution organizational elements are defined, necessary assignments are required for SD processing and integration aspects with Finance and Materials management.

2.1 Assign Sales organization to company code

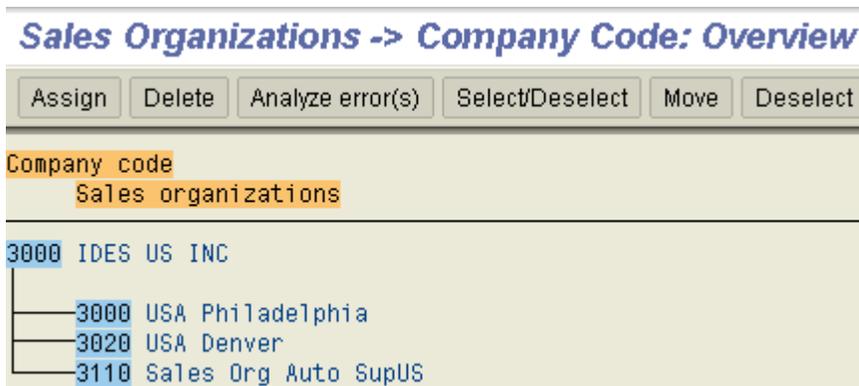
Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment → Sales and Distribution → Assign sales organization to company code



Click  Assign sales organization to company code

Assign Sales organization to company code



This assignment is important for integration with finance. One sales organization is assigned to one company code.

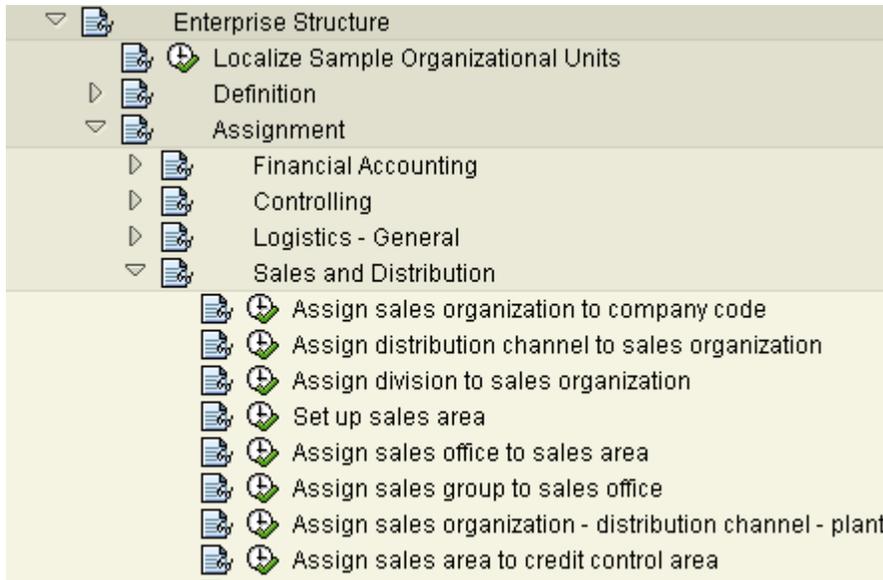
Perform the following steps to do assignment:

- a. Click on sales organization
- b. Click Select/Deselect
- c. Click on company code
- d. Click on Assign

2.2 Assign Distribution channel to Sales organization

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment → Sales and Distribution



Click  Assign distribution channel to sales organization

Distribution Channels -> Sales Organization:

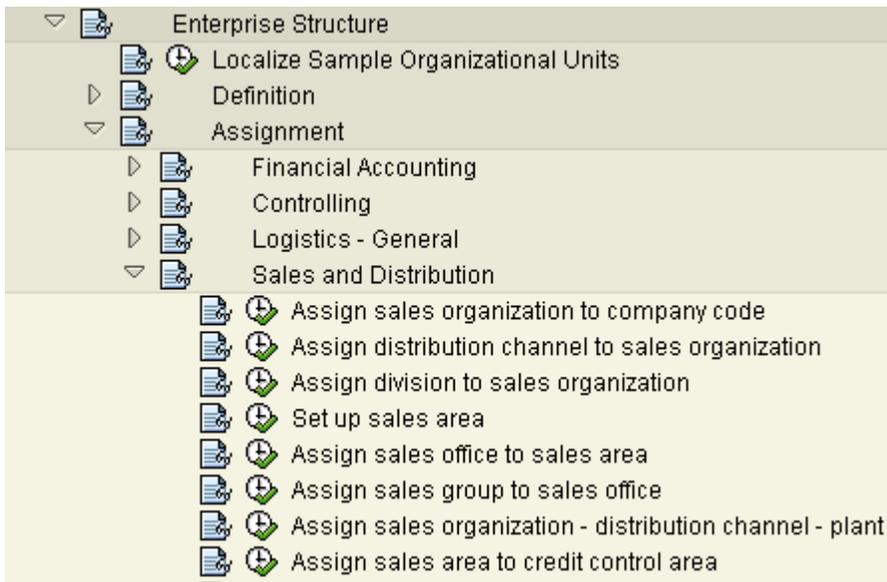


One distribution channel can be assigned to more than one sales organization.

2.3 Assign division to sales organization

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment
→ Sales and Distribution



Click  Assign division to sales organization

Divisions -> Sales Organization:



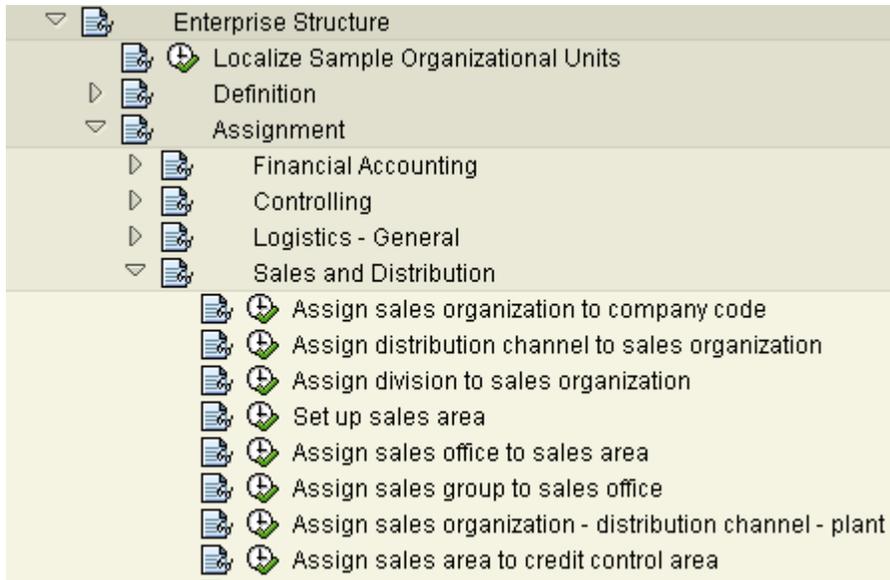
Division is normally grouping of products based on certain characteristics of the product. One division can be assigned to more than one sales organization.

Above 3 configurations are required before we setup sales area.

2.4 Setup Sales Area

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment → Sales and Distribution



Click  Set up sales area



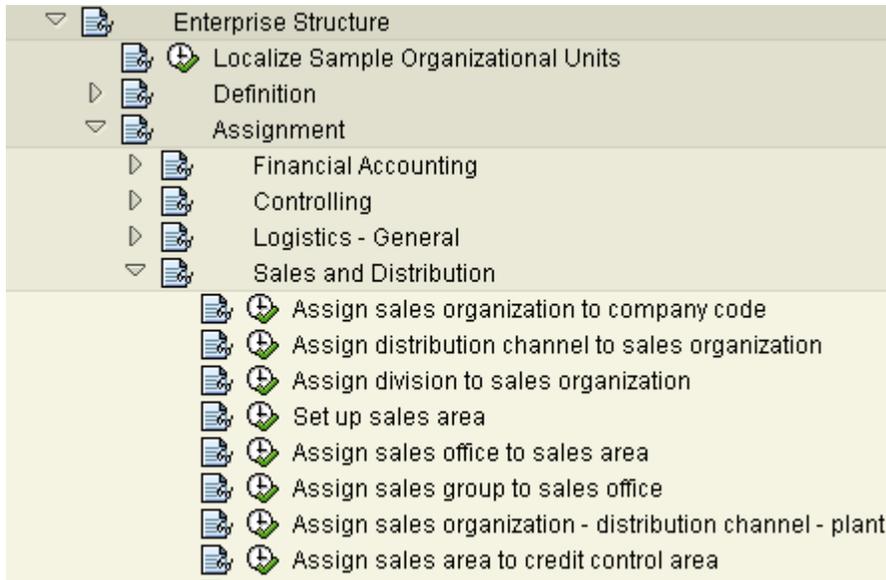
Sales area is a combination of sales organization, distribution channel and division.

A sales document like inquiry, quotation or order is created for a sales area. Further sales processing is then done creating delivery and then billing. Billing document gets created in the same sales area

2.5 Assign Sales office to sales area

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment → Sales and Distribution



Click  Assign sales office to sales area

Sales Offices -> Sales Area: Overview

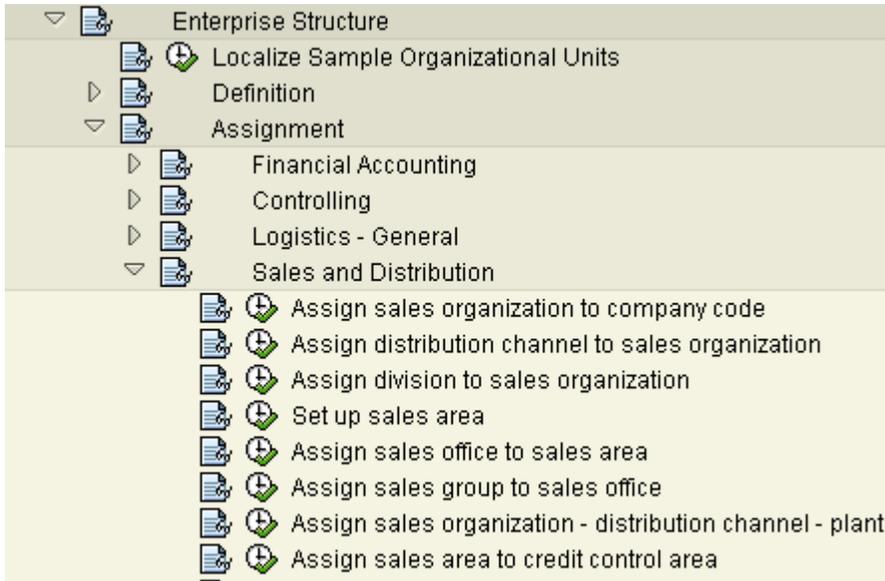


Sales office is then available for assigning in sales area data of the customer or changing manually in the sales order. One sales office can be assigned to more than one sales area.

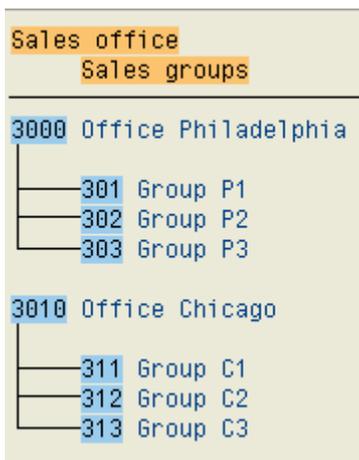
2.6 Assign Sales group to Sales office

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment → Sales and Distribution



Click Assign sales group to sales office

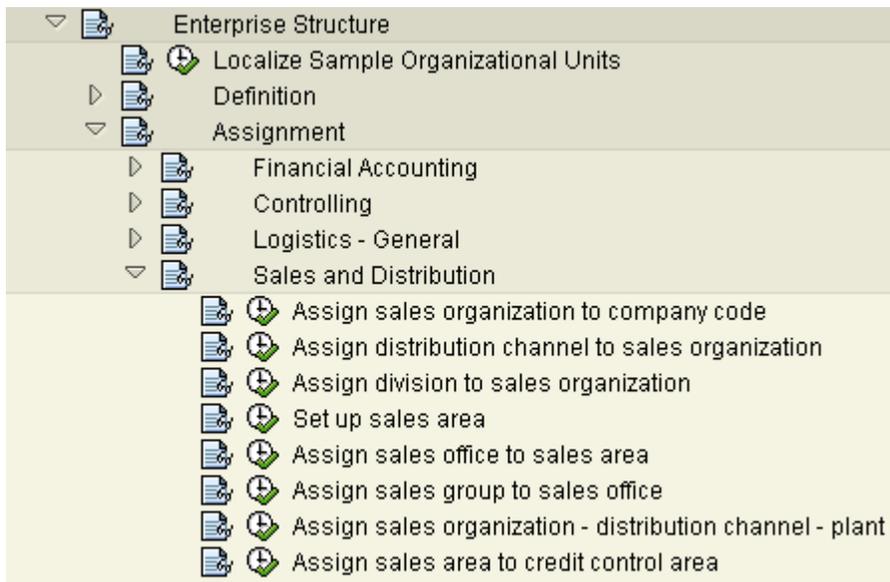


One sales group can be assigned to more than one sales area.

2.7 Assign Sales organization to plant

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment
→ Sales and Distribution



Click  Assign sales organization - distribution channel - plant

Plants -> Sales Organization/Distribution Channel: (

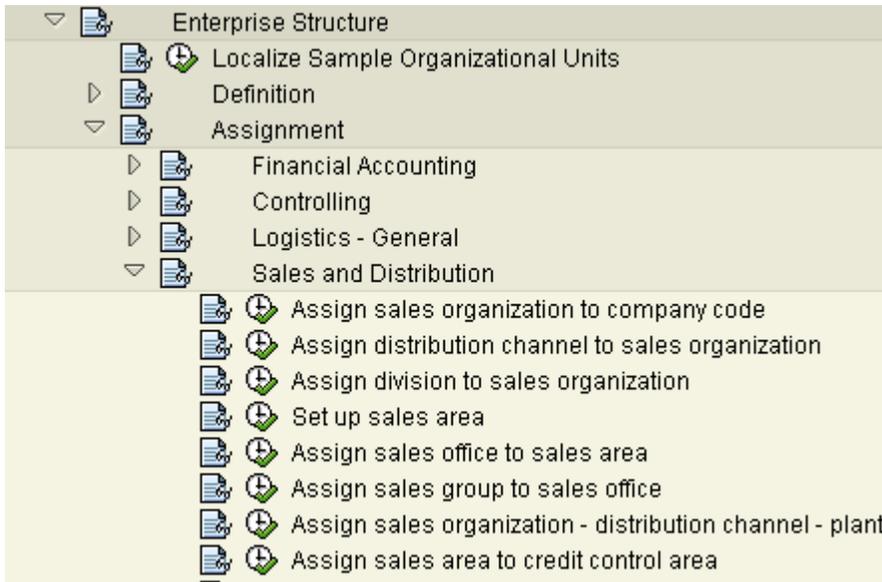
Sales organization/distribution channel			
Plants			
3020	10	USA Denver	Final customer sales
—	3000	New York	
—	3050	UK	
—	3100	Chicago	
—	3105	Chicago	
—	3200	Atlanta	
—	3800	Denver Distribution center	
—	5320	Atlanta	
3020	12	USA Denver	Sold for resale
—	1200	Dresden	
—	3050	UK	
—	3200	Atlanta	
—	3800	Denver Distribution center	
—	5320	Atlanta	

This assignment is key assignment for allowing one of these plants to get determined in the sales order item.

Assign sales are to credit control area

Instructions

Follow Menu Path: IMG → Enterprise structure → Assignment
→ Sales and Distribution



Click Assign sales area to credit control area

Change View "Sales Area: Allocation to Credit Control Area":



Credit control area can be assigned here so that the credit control area data can be checked for the customer during sales order processing.

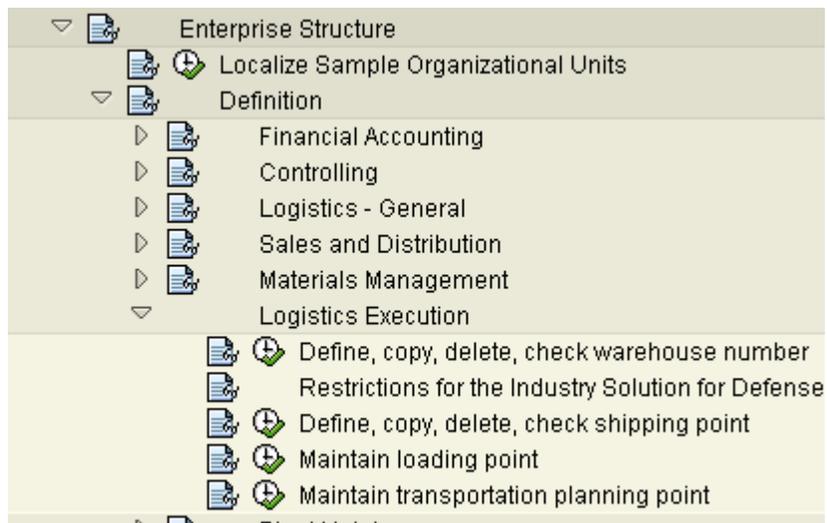
3 Enterprise structure – LE - Definition

BACKGROUND

Delivery creation and shipping activities need configuration, which is done under Logistics execution.

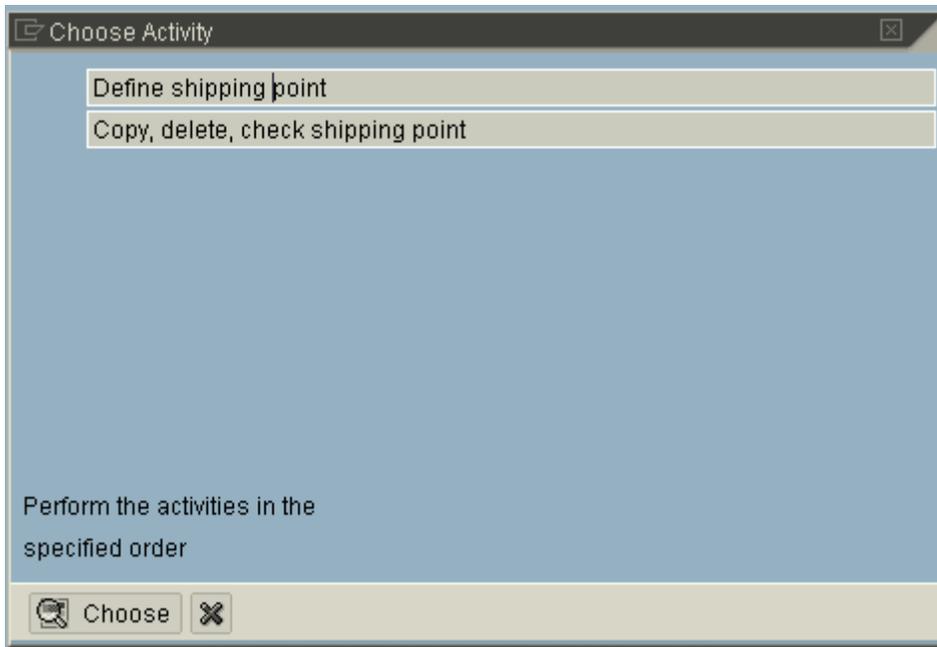
Instructions

Menu path:



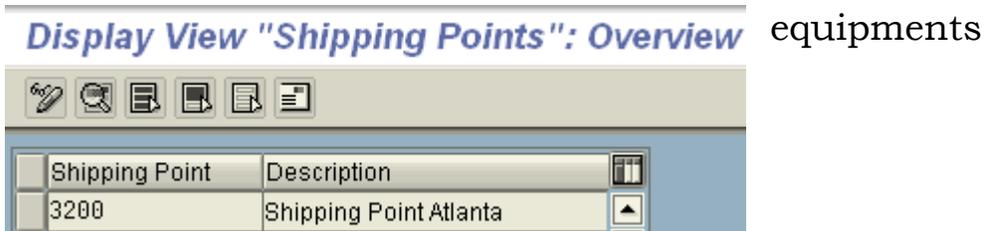
Click  Define, copy, delete, check shipping point

System displays the pop-up



Double click “define shipping point”

Select shipping point 3200 from the list



Shipping point is location, which groups loading equipments etc. for completing shipping activities. Delivery is created using shipping point.

Display View "Shipping Points": Details

    	
Shipping Point: 3200 Shipping Point Atlanta	
Location	
Country	US
Departure Zone	0000000001
Times	
Factory Calendar	US Factory calendar US standard
Working Times	
Determine Times	
Determine Load. Time	<input type="checkbox"/> Default from shipping point
Loading Time w.Days	1.00
Det.Pick/Pack Time	<input type="checkbox"/> Default from shipping point
Pick/pack time wrkdys	1.00
Rounding Work Days	0.00
Form Text Names	
Address Text Name	SD_VST_0001_KA
Letter Header Text	
Text Name Foot.Lines	SD_VST_0001_FU
Text Name Greeting	
Text Name SDB Sender	
Print Picking List	
Output Type	
Message Language	
Number of Messages	0
Send Time	
Transmission Medium	
Subsystem	
Background Processing	
<input type="checkbox"/> Displ.info	
Others	
Pick confirmation	<input type="checkbox"/>

Key fields

Country – Country of the shipping point

Departure zone – Regional zone in which shipping point is located. This is used in route determination.

Factory calendar – Working day calendar for the shipping point. This is used in delivery and transportation scheduling in determination of shipping dates in the sales order.

Working times – It is defined to use shift timing and sequence to do precise scheduling in sales order.

Lead times for pick/pack and loading – The options available for determining lead times can be set here. This is explained in detail in delivery and transportation scheduling guide.

Texts – You can assign different standard texts required as on delivery related outputs. Standard texts can be defined with transaction code SO10.

Pint picking list – Picking output related default data can be defined here.

Click  to maintain address



Display address: 3200

Name

Title

Name

Search terms

Search term 1/2

Street address

Street/House number

Postal Code/City

Country United States Region Georgia

Transportation zone

PO box address

PO Box

Postal Code

Company postal code

Communication

Language

Telephone Extension

Mobile Phone

Fax Extension

E-Mail

Standard Comm.Method

Comments

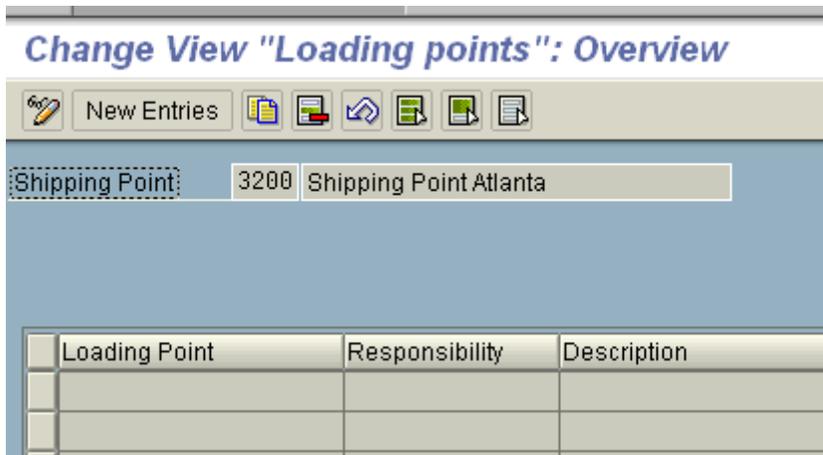
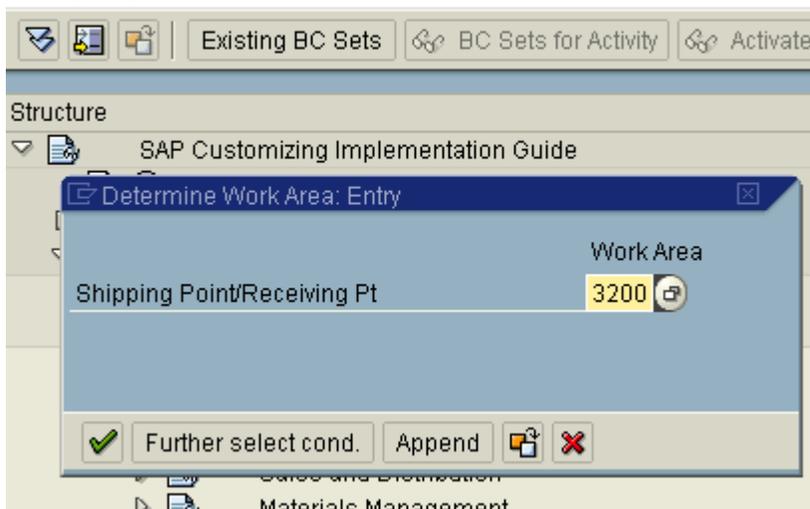
3.1 Loading point

It is a sub-division of shipping point. Its use is not mandatory. It can be maintained in delivery header.

Click  Maintain loading point

On the next screen, enter shipping point.

Display IMG



3.2 Transportation planning point

It represents department, which organizes transportation planning for a shipment. It is defined under a company code. This is defined only if shipment function of Transportation module is used.

Click  Maintain transportation planning point

Display View "Transportation planning points"

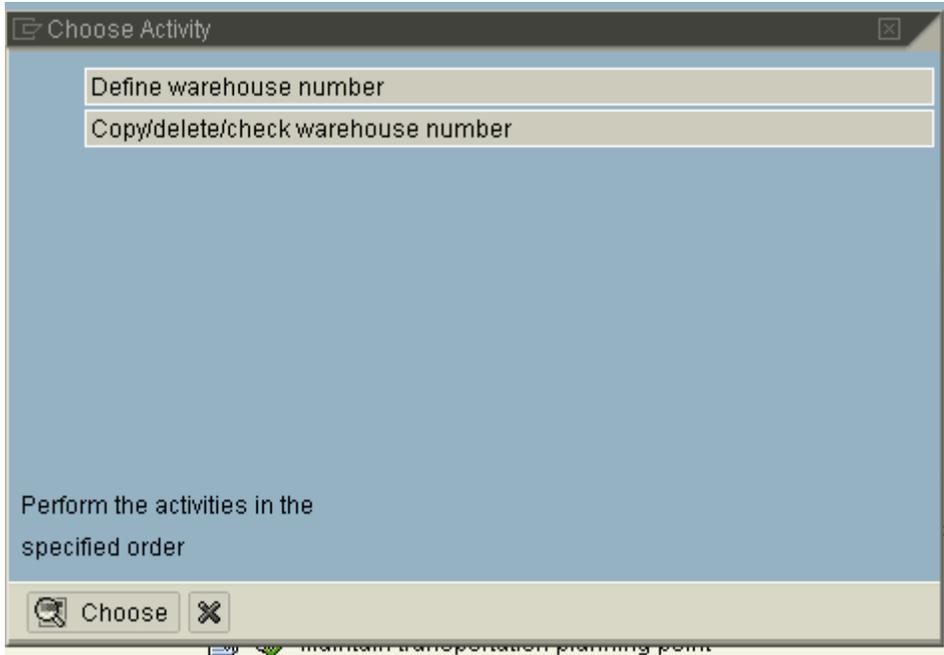


TPPt	Description	Co...	
3200	Trsp. Atlanta Truck	3000	

Define warehouse

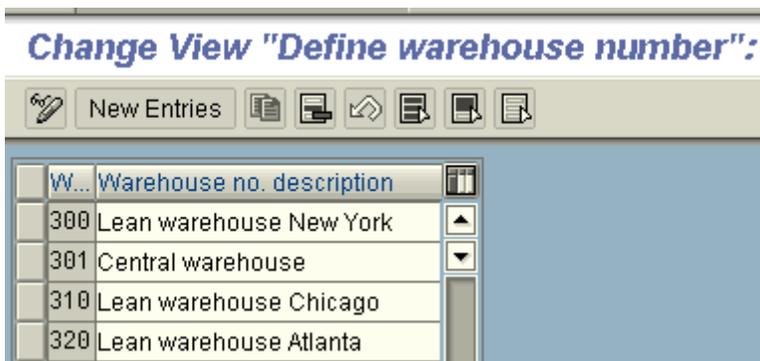
If warehouse management module is implemented, then it is defined.

Click  Define, copy, delete, check warehouse number



Double click “define warehouse number”

It is a code. This then gets determined in delivery for picking activity as per warehouse management settings.



Note: Warehouse management (WM) settings are done by MM-WM expert. Configuration shown here is to make SD consultant aware about these settings.

4 Enterprise structure – LE - Assignment

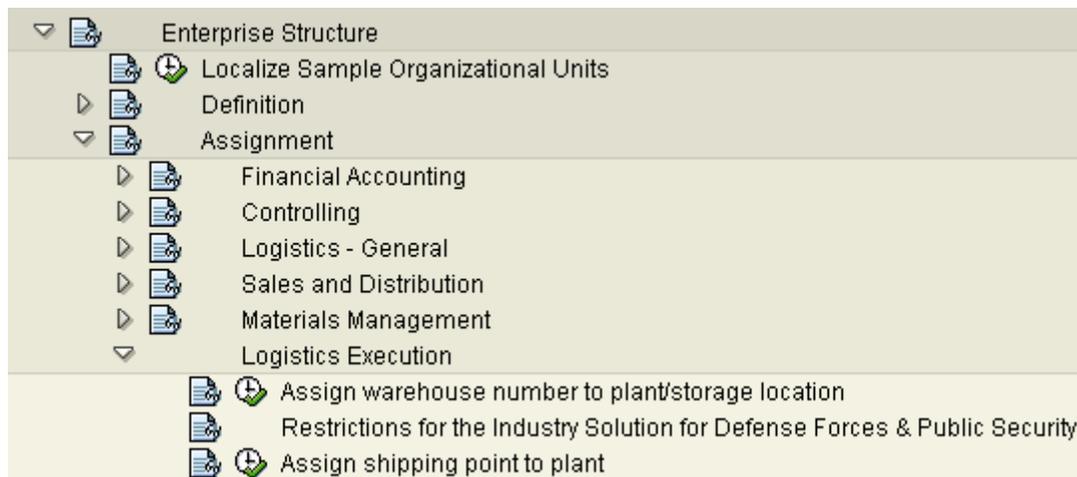
BACKGROUND

This configuration setting enables to define Shipping point and warehouse related assignments,

Warehouse management related settings are essential where WM module is implemented.

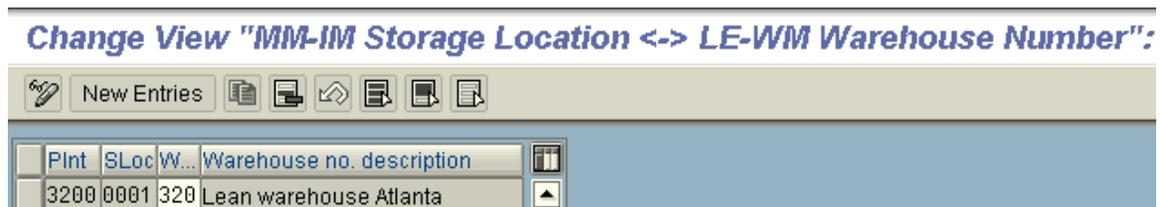
Instructions

Menu path:



MM-WM expert does warehouse related assignments.

Click [Assign warehouse number to plant/storage location](#)



Example – Warehouse 320 is assigned to plant, 3200 and storage location, 0001.

Click  Assign shipping point to plant



More than one shipping point can be assigned to one plant. One of these then is determined on the basis of shipping point determination. (This is configured in Logistics execution configuration)

5 Master Data - Define Common Distribution channel

BACKGROUND

Data related to sales and marketing, which is required for master data is defined here.

To reduce effort of entering customer, material and pricing condition records for every distribution channel and division is reduced using concept of common distribution channel and division.

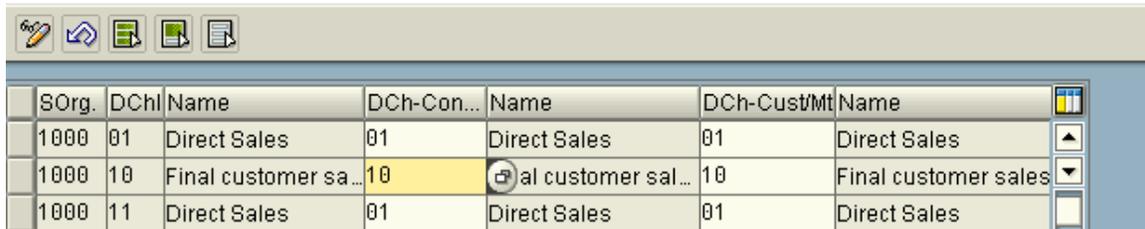
Instructions

Menu path: IMG → Sales and Distribution → master data →



Define Common Distribution channels

Change View "Org.Unit: Dist.Channel per Sales Org.- Assign Master Da



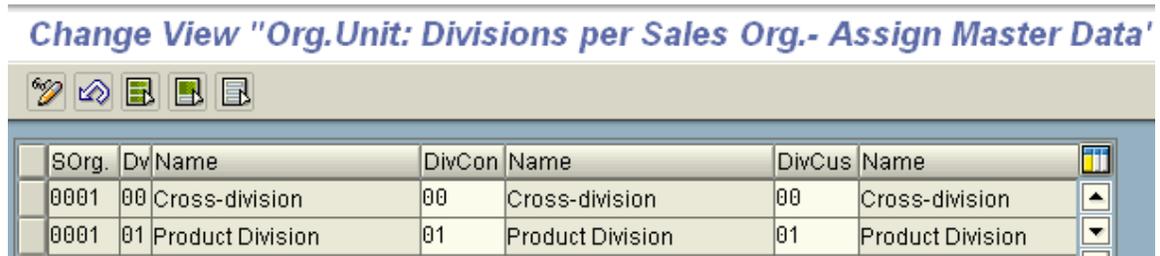
The screenshot shows the SAP Change View interface. At the top, there are icons for edit, home, list, and print. Below the icons is a table with the following data:

SOrg.	DChl	Name	DCh-Con...	Name	DCh-Cust/Mt	Name
1000	01	Direct Sales	01	Direct Sales	01	Direct Sales
1000	10	Final customer sa...	10	Final customer sal...	10	Final customer sales
1000	11	Direct Sales	01	Direct Sales	01	Direct Sales

Example – sales organization, 1000 and distribution channel, 01. 01 is used as common distribution channel for master data. Distribution channel 11 uses master data same as that of distribution channel 01

Define Common divisions

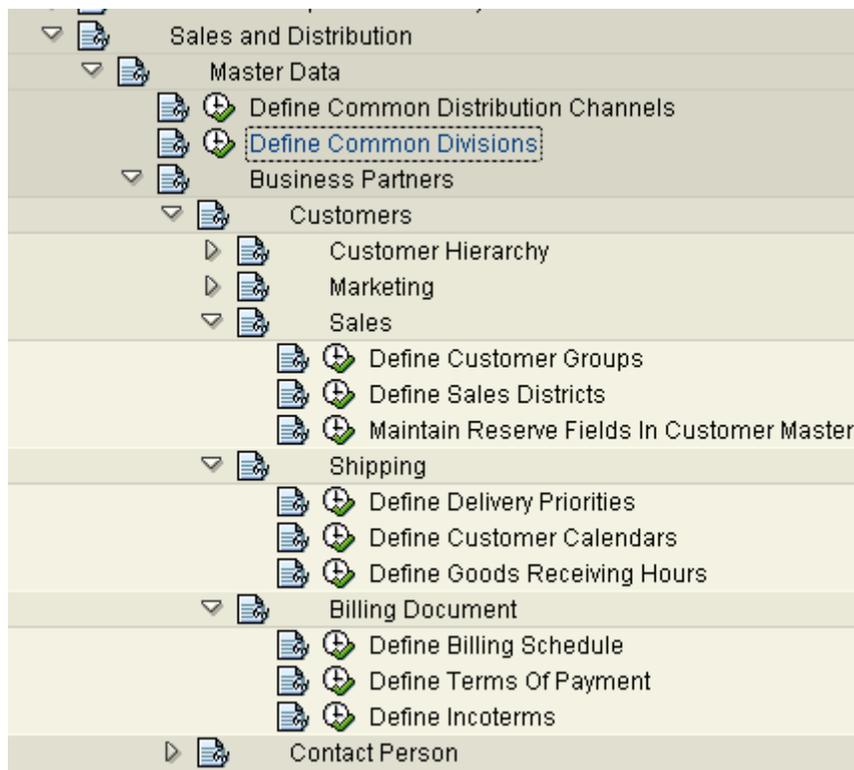
Change View "Org.Unit: Divisions per Sales Org.- Assign Master Data"



SOrg.	Dv	Name	DivCon	Name	DivCus	Name
0001	00	Cross-division	00	Cross-division	00	Cross-division
0001	01	Product Division	01	Product Division	01	Product Division

Principle here same as common distribution channel

SD --- Master Data --- Business partners



Data fields are maintained as above so that they can be used in maintaining master data. Key data is as below

- Customer group
- Delivery priority
- Terms of payment

- Inco-terms