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## Order Fulfillment I

### Course Goals

- Learn about the main business processes in sales processing
- Execute the most important functions in the process chain from the presales phase to the incoming payment in the system
- Gain an extensive overview of the sales and distribution areas as part of the SD component in the SAP system
- Obtain a more detailed insight into sales and distribution functions using selected examples
- Build up the knowledge needed to implement these functions and be able to use them
- Acquire knowledge of how to adapt the system using Customizing settings to meet your own specific requirements in sales and distribution

### Course Objectives

- Maintain the key master data in Sales and Distribution, and name and define the required business structures
- Work with the various documents in Sales and Distribution Describe the points of contact from Sales and Distribution to the materials management, production (for example, make-to-order) and financial accounting areas
- Perform analyses for Sales and Distribution processes
- Integrate sales in the Sales and Distribution process chain
- Configure Customizing so that it represents your specific sales requirements
- Describe the position of distribution within the supply chain
- Execute the different functions within distribution processing
- Adapt the system to suit your distribution processing requirements

### Unit 1: Navigation

- Identify the elements of a standard window
- Navigate in the system
- Use the basic help functions
- Make personal system settings.

## Unit 2: Enterprise Structures in Sales and Distribution

- Describe sales and distribution structures.  
Explain the most important relationships between the organizational structures in sales and distribution
- Name the organizational units relevant to sales and distribution in the *SAP ERP Central Component* system
- Describe the essential characteristics of these organizational units
- Explain the most important relationships between the organizational structures in sales and distribution
- Describe the sales and distribution structures of IDES, Inc.

## Unit 3: Overview of Sales Processes

- Explain the process chain for sales order processing
- Create a sales order with reference to a quotation
- Create an outbound delivery with reference to a sales order
- Pick and post goods issue
- Invoice a customer for the delivery
- Enter an incoming payment in the system

## Unit 4: Master Data in Sales and Distribution

- Maintain customer master data
- Maintain material master data
- Maintain the customer-material info record
- Maintain condition master data and explain pricing functions
- Issue output for sales documents
- Work with the incompleteness log

## Unit 5: Sales and Distribution Processes – Data Determination and Collective Processing

- Trigger different sales processes by choosing suitable sales document types
- Explain how the delivering plant, shipping point and route are determined automatically
- Give the customers delivery dates automatically determined in the system and be able to look at scheduling in detail
- Combine and collectively process sales orders due for outbound delivery in one step
- Combine and collectively process documents due for billing in one step

## Unit 6: Availability Check

- Describe the basic principles and function of the availability check
- Use the availability check as part of order processing
- Explain how deliveries are shipped
- Describe how shipment costs are billed to the customer
- Explain how financial information is transferred from the billing document into the accounting document

## Unit 7: Make-To-Order

- Describe presales activities
- Use inquiries and quotations
- Explain key functions of item categories
- Track the status of assembly orders for make-to-order sales orders

## Unit 8: Complaints Processing

- Process a complaint with reference to a previous sales and distribution process
- Carry out and explain in detail credit memo processing
- Process a complaint with reference to a previous sales and distribution process
- Carry out and explain in detail returns processing
- Process a complaint with reference to a previous sales and distribution process
- Use an invoice correction request and explain the process in detail
- Cancel a billing document
- Pack items in an outbound delivery

## Unit 9: Analyses for Sales and Distribution Processes

- Use list processing to locate and evaluate information
- Analyze SD information using the tools available in the Sales Information System (SIS)
- Define the components of information structures
- Describe how *SAP Business Information Warehouse* works

## Unit 10: Enterprise Structures in Sales and Distribution

- Use organizational units in the SAP system to map the different areas in your company
- Set up enterprise structures by assigning them to organizational units
- Adjust the organizational structures to meet the legal and business requirements of your Company

## Unit 11: Sales Order Processing

- Determine the origin of document data from various sources, like the material master, the customer master, or Customizing

- Find and use the tools and help for entering and processing sales orders

## Unit 12: Controlling Sales Documents

- Describe the basic principles of business process control in sales.
- Identify the elements that control the sales documents
- Name examples of different sales document types used for different business processes
- Explain what the sales document type does
- Create Customizing settings for the sales document type
- Restrict the validity of sales document types to sales areas
- Identify and explain the important control parameters for item categories
- Create a new item category
- Configure the system so that item categories are automatically assigned to a sales document type
- Control settings for bills of material in the sales document.
- Identify and explain the most important control parameters for schedule line categories
- Create a new schedule line category
- Configure your settings so that schedule line categories are automatically assigned to each sales document item

## Unit 13: Data Flow

- Use document flow
- Understand and influence how data is passed on between sales documents at header, item and schedule line level and recognize possibilities for individual
- Use the completion rule for item categories to control creation of documents with reference.

## Unit 14: Special business transactions

- Explain the differences between cash sales and rush orders and their special features
- Explain how customer consignments are represented in Customizing for sales
- Control free-of-charge deliveries and subsequent free-of-charge deliveries
- Company adjustments.

## Unit 15: Incompleteness

- Understand the incompleteness log and process incomplete orders.
- Adjust the incompleteness log to meet your own requirements using Customizing.

## Unit 16: Business partner

- Understand the importance of the partner function concept for the sales and distribution process.
- Define new partner functions and integrate these into the process chain.

## Unit 17: Outline agreements

- Use different types of outline agreements and their functions
- Configure outline agreements in Customizing so that they meet your requirements.
- Set up and use value contracts in Customizing.
- Store partners authorized to release in contracts.

## Unit 18: Material Determination, Listing and Exclusion

- Explain and use the material determination and product selection
- Explain how to configure customizing so that these functions meet your needs
- Create master records
- Understand and analyze the settings for these functions in the sales document
- Explain and use the material listing and exclusion functions.

## Unit 19: Free goods

- Set up automatic free goods determination.

## Unit 20: Sales Workshop

- Set up a cash sales scenario with the sales workshop for the sale of materials to your own employees.
- Control the various functions of bills of material at main and sub-item level.
- Expand the condition technique in material determination so that this may be both customer-specific and non customer-specific.

## Unit 21: Overview of the Delivery Process

- Identify the delivery process as part of the Logistics Execution process
- Explain the structure of the delivery document and find information in the delivery Document

## Unit 22: Basic Customizing Settings for the Delivery Process

- Describe the organizational units relevant to shipping
- Define and assign the organizational units in the Implementation Guide
- Give an overview of the standard delivery types
- Explain delivery control at header and item level
- Describe item category determination in outbound deliveries
- Describe how delivery documents are used in other processes

## Unit 23: Goods Issue Process

- Describe shipping point determination

- Define route determination
- Configure shipping and transportation scheduling and use the route schedule functions
- Create outbound deliveries using collective processing
- Define picking location determination
- Define the door and staging zones and determine them in the outbound delivery
- Change and add to outbound deliveries
- Monitor shipping activities within the goods issue process
- Describe the picking process using transfer orders
- Create transfer orders manually and using collective processing
- Confirm transfer orders

## Unit 24: Special Functions for Processing Deliveries

- Explain how batches can be specified in the outbound delivery
- Demonstrate serial number assignment in the outbound delivery
- Use pricing in the outbound delivery
- Split an existing delivery into several smaller deliveries

## Unit 25: Packing

- Define the term “packaging materials”
- Describe the process for multi-level packing in Sales and Distribution
- Create packing instructions and determination records for automatic packing
- Make the necessary settings for determining permitted packaging material
- Explain the different follow-on processes for packaging material
- Describe what a handling unit is
- Create handling units within delivery processes
- Make the necessary settings for handling unit management

## Unit 26: Goods Issue

- Post the goods issue
- Describe the effect that the goods issue posting has on Sales and Distribution, Materials Management, and Financial Accounting
- Cancel the goods issue posting
- Explain how to link Quality Management with the shipping process
- Describe how to use proof of delivery

## Unit 27: Final Exercise

- Set up the specified delivery scenario in the SAP system

## Unit 28: Appendix

- Table structures in sales and distribution
- Matchcode objects

- Authorization objects
- Control delivery blocks
- Set up group master contracts
- Set up cancellation rules for contracts.
- Set up service processing in Sales and Distribution.

## Course Summary

- Maintain the key master data in Sales and Distribution, and name and define the required business structures
- Work with the various documents in Sales and Distribution Describe the points of contact from Sales and Distribution to the materials management, production (for example, make-to-order) and financial accounting areas
- Perform analyses for Sales and Distribution processes
- Integrate sales in the Sales and Distribution process chain
- Configure Customizing so that it represents your specific sales requirements
- Describe the position of distribution within the supply chain
- Execute the different functions within distribution processing
- Adapt the system to suit your distribution processing requirements

## Order Fulfillment II

### Course Goals

- Define the necessary system settings for pricing in Sales Order Management
- Use the billing function in SAP Sales and Distribution
- Configure the system to meet your company-specific billing requirements
- Explain the role of the interface between billing in Sales and Distribution and accounts receivable in Financial Accounting
- Make settings that require knowledge of cross-application Customizing functions, to map Sales and Distribution (SD) requirements in the SAP system.

### Course Objectives

- Describe the elements of the pricing condition technique and the relationships between them
- Convert your pricing requirements to the necessary pricing strategy.
- Make the necessary Customizing settings to implement your pricing strategy
- Describe the integration of billing within the Sales and Distribution process chain and the transfer of data to Financial Accounting
- Carry out the Customizing configurations for your company-specific billing requirements
- Cross-functional Customizing settings for the copying control, text control, output control and adapting the user interface functions.

## Unit 1: Condition Technique in Pricing

- Explain how to use conditions in pricing
- Demonstrate how to use condition records
- Locate condition types in customizing
- Use pricing procedures in pricing
- Describe pricing procedures and access sequences
- Explain header conditions
- Control new pricing using the pricing type

## Unit 2: Pricing Configuration

- Change and add to different pricing elements
- Explain pricing configuration

## Unit 3: Working with Condition Records

- Maintain conditions using pricing reports
- Create, change, and copy condition records
- Create net price lists
- Use a condition index to find condition records
- Use the release procedure for condition records

## Unit 4: Special Functions

- Use group conditions to carry out pricing for several items in an order
- Compare condition types with several methods and outcomes
- Set conditions for a maximum value, quantity, or number of orders
- Describe how and when to use condition supplements
- Optimize pricing for hierarchical data constellations using hierarchy accesses
- Explain the techniques of data determination in access using the price book as an example
- Implement customizing settings for pricing

## Unit 5: Condition Types

- Create order values and net prices manually
- Set a minimum price for a material or a minimum value for an order
- Set interval scales for conditions
- Use customer hierarchies for price agreements
- Describe the effect of condition formulae
- Round final amounts
- Determine costs and cash discount amounts statistically in pricing
- Describe how expected customer prices transferred using EDI are used

## Unit 6: Taxes, Pricing Agreements, and Rebates

- Describe the criteria taken into account to determine taxes

- Describe how taxes are determined for each order item
- Use agreements to implement and evaluate marketing projects
- Describe the entire rebate processing procedure
- Create rebate agreements
- Perform rebate settlements
- Control rebate processing in Customizing

## Unit 7: Introduction

- Apply the billing functionality in Sales and Distribution
- Configure the system to meet your company-specific billing requirements
- Describe the integration of the billing document within the SD process chain
- Explain the transfer of data from Sales and Distribution to Financial Accounting
- Describe the structure of a billing document
- Access the different information contained in the billing document

## Unit 8: Basics

- Describe the relevant organizational units in Sales and Distribution and Financial Accounting

## Unit 9: Controlling the Billing Process

- Describe different business transactions in the context of billing and billing types
- Demonstrate the importance of the item category within billing
- Explain the assignment of these organizational units to one another

## Unit 10: Special Billing Types

- Explain the process flow and methods of control for various business transactions within the context of billing
- Explain the process flow and methods of control for various business transactions within the context of billing.

## Unit 11: Data Flow

- Name the documents that can form the basis of the billing document
- Describe the way the process chain is mapped in the document flow
- Demonstrate the different sources for the data in the billing document
- Name the requirements that must be met in order for billing to be carried out

## Unit 12: Creating Billing Documents

- Explain the different options for creating billing documents
- Explain the significance of the billing due list for creating billing documents in collective

- runs
- Demonstrate the option for displaying invoice creation on specific dates
  - Describe how to cancel a collective billing run
  - Describe the different control parameters within the framework of copying control

## Unit 13: Types of Settlements

- Explain the different types of settlement
- Give the reasons for splitting an invoice
- Make the required settings for using invoice lists

## Unit 14: Special Business Transactions

- Carry out a business process with periodic billing and milestone billing
- Describe the process for down payment processing in Sales and Distribution and Financial Accounting
- Describe the process for installment payments

## Unit 15: Account Determination

- Describe the different areas in which account determination is used
- Describe the account determination process
- Explain the use and determination of business areas

## Unit 16: SD/FI Interface

- Explain how to prevent the system from automatically generating accounting documents
- Describe different fields for transferring data from Sales and Distribution to Financial Accounting (for example, for clearing)
- Explain how partners are transferred from Sales and Distribution in terms of the relationship between the head office and the branch offices
- Outline how negative postings, the document type, and value dated credit memos affect the billing type

## Unit 17: Copying Control

- modify copying control to meet special requirements

## Unit 18: Text Control

- Identify the source of texts in Sales and Distribution
- Describe the criteria which influence how texts are determined
- Define and assign text types in Customizing
- Edit texts manually in the sales document

## Unit 19: Output

- Describe the purpose of output types
- Set up various transmission media for issuing or printing output
- Select the dispatch times at which the output is issued
- Adjust the output determination to meet customer-specific requirements
- Explain how output types are processed in the SAP system
- Assess the degree of difficulty involved in adjusting the existing layout for output types to meet your requirements
- Name the steps needed for integrating customer-specific output types

## Unit 20: System Modifications

- define account groups for maintaining customer master records
- adapt screens that use the display element “table control” to meet your specific requirements
- create and use transaction variants

## Course Summary

- Describe the elements of the pricing condition technique and the relationships between them
- Convert your pricing requirements to the necessary pricing strategy.
- Make the necessary Customizing settings to implement your pricing strategy
- Describe the integration of billing within the Sales and Distribution process chain and the transfer of data to Financial Accounting
- Carry out the Customizing configurations for your company-specific billing requirements
- Cross-functional Customizing settings for the copying control, text control, output control and adapting the user interface functions.