

SCM940 Asst 2.1 Customer Master Records

By Adriana Madrid

Please answer the following questions and/or insert requested print screens (for questions in red) directly on this document, save it, then attach the document to Asst 2.1 in Blackboard. Please ensure that all responses are properly identified by their number in the assignment. Please use the Snipping Tool to capture only what is requested for print screens. (10 marks) **Note: you will need to get your ## from the Data Assignment Sheet for SCM940 Assignment 2.1.**

PART1 CREATE A BASIC CUSTOMER MASTER RECORD FOR THIS ASSIGNMENT

1. Create a new customer master record for your company (company 1000) **with the customer number 26### for the sales area 1000, distribution channel 12 and division 00 by going to: Logistics > Sales and Distribution > Master Data > Business Partner > Customer > Create > Complete**
2. Complete the initial screen as in the print below for your new customer 26### (get your number from the Data Assignment Sheet 4.1) by entering the appropriate data from the table below:

Account Group	Sold to Party – 0001 (must use exact group)
Customer	26 022
Company Code	1000
Sales Organization	1000
Distribution Channel	12
Division	00

NOTE: If the Company Code, Sales Organization, Distribution Channel and Division are not present and correct, you will not be able to create a full Customer Master. **3. Take a prim screen of your initial screen and insert it here.**

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Customer Create: Initial Screen

Account group Sold-to party - 0001

Customer 26022

Company code 1000 BestRun Germany

Sales area

Sales Organization 1000 Germany Frankfurt

Distribution Channel 12 Sold for resale

Division 00 Cross-division

Reference

Customer

Company code

Sales organization

Distribution channel

Reference division

4. Then clicking on continue icon and the following screen should appear:

Create Customer: General Data

Other Customer Company Code Data Sales Area Data Additional Data, Empies Addition

Customer 26699

Address Control Data Payment Transactions Marketing Unloading Points Export D

Preview Internat. versions

Name

Title

Name

Search Terms

Search term 1/2

Street Address

Street/House number

Postal Code/City

Country Region

Transportation zone

PO Box Address

5. Complete the customer master record by entering the required data from the table below into the correct view of the customer record. Note direction to specific tabs and Data Groups.

ADDRESS DATA (Tab) of GENERAL DATA	
Title	Company (select)
Name	(Your Family Name) Specialty Meats
Search Item	SCM940-### (as in Customer ### above)
Street	Venusstr, ### (as in Customer ### above)
Postal Code	20111

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City	Hamburg
Country	Germany
Transportation Zone	Region North
Language	Eng
CONTROL DATA (Tab)	
VAT Registration Number	DE###12345 (as in Customer ### above)
COMPANY CODE DATA (Icon, top row)	
Reconciliation Account	140000
SALES AREA DATA (Icon, top row)	
SALES (Tab)	
Customer group	Trading Companies
SHIPPING (Tab)	
Shipping condition	073
Delivering Plant	1000 Hamburg
BILLING DOCUMENT (Tab)	
Incoterms	CFR Hamburg
Terms of Payment	ZB00
Tax Classification	Liable for tax (1)

6. Take a print screen of you customer record **Sales Area Data page** and insert it here. Please use the Snipping tool.

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Create Customer: Sales Area Data

Other Customer General Data Company Code Data Additional Data, Empties

Customer: 26022 Madrid Sanchez Speciality Meats Hamburg

Sales Org.: 1000 Germany Frankfurt

Distr. Channel: 12 Sold for resale

Division: 00 Cross-division

Sales Shipping **Billing Documents** Partner Functions

Incoterms: CFR Hamburg

Terms of payment: ZB00 Pay immediately w/o deduction Paym.guar.proc.

Credit ctrl area:

Accounting

Acct assgmt group:

Taxes

Country	Name	Tax categ...	Name	Tax...	Description
AR	Argentina	JIAU	VAT	1	
CN	China	MWST	Output Tax	1	Liabile for Tax
DE	Germany	MWST	Output Tax	1	Liabile for Tax

7. Save your customer record by clicking on the save icon. 

8. Use the Snipping tool to insert a print screen of your saved customer record like in the example below ensuring the Customer 266## has been created banner.

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Customer Create: Initial Screen

Account group  Sold-to party - 0001

Customer 

Company code BestRun Germany

Sales area

Sales Organization	<input type="text" value="1000"/>	Germany Frankfurt
Distribution Channel	<input type="text" value="12"/>	Sold for resale
Division	<input type="text" value="00"/>	Cross-division

Reference

Customer		<input type="text"/>
Company code	<input type="text"/>	
Sales organization	<input type="text"/>	
Distribution channel	<input type="text"/>	
Reference division	<input type="text"/>	

    

 Customer 0000026022 has been created for company code 1000 sal...  >> | SD3 (

9. You are not sure whether you have used the Incoterms fields correctly. How can you get information in the system to make sure that you have used them correctly? (Hint – use help)

In incoterms, click on the box in the right, highlight and click help on the top button, it will say how to use incoterms properly, use the incoterm field and assign the incoterm that is needed and it will give more details.

10. Using the Customer display transaction, in the sales area data section, check which customer is the **bill-to party** on the Partner functions tab page.

Madrid Sanchez Specialty Meats was assigned as the bill to party

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11. How can you check in the system the **sales areas** for which the customer record has been maintained?

Display Customer Complete XD 03 add customer number 26022 and add company area 1000 and select customer's sales area. It will show the information in a new pop up window.

12. How can you display a **list of orders** for the customer from the customer master? (Hint – you need to look around the screens)

Within running the Transaction document number XD-03, add customer number 26022 and add company code 1000, in customer master data, then go to environment button and click on it, and list documents, in orders, list of sales orders, add the customer number into Sold to party box, specify the documents, then execute and in the new pop up fill with 1000 as sales organization, execute again and it will show the list is needed.

13. You have created the new customer master record for sales organization 1000, distribution channel

Within the VD01, add the information is required to create sales organization for customer 26022.

12, and division 00 only. Sales organization 1020 may possibly want to sell goods to the customer as well. What would you need to do to make it possible for **sales organization 1020** to enter sales orders for this customer?

Within VD01 and add all information is requested there, create sales organization 1020 for the customer 26022

14. Explain the function of the **Reconciliation Account** you entered in the Company Code section of your customer record.

Transactions are saved and posted in the general ledger. The reconciliation account is there, and it will have the financial report and balance and general ledger with zero

End of Asst 2.1