Exercises

Unit: SAP Business One Basics

Topic: Master Data and Documents

At the conclusion of this exercise, you will be able to:

- View business partner master data
- Create a sales quotation draft document
- Change and save a sales quotation
- Copy a sales quotation to a sales order
- Use Drag and Relate

In this exercise, you will view business partner master data. You will search for a customer master data record.

You will create a sales quotation for the customer and save it as a draft. You run a list of draft documents, open the draft sales quotation, make changes and then save the sales quotation as a regular document.

Open the sales quotation and copy the information to a sales order.

Use Drag and Relate to find all sales orders for this customer.

3-1 Find and view a customer master.

3-1-1 Open the window for Business Partner Master Data. Search for customer **Parameter Technology** using first initial and wild cards (*).

Tip: You can use the menu path or open the transaction using the shortcut you created in the previous exercise.

Note: If there is more than one customer with a name that begins with P, then a list of business partners will open. Then you can choose the business partner from the list.

3-1-2 How many contact persons are listed for this customer? Which one is the default contact?

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3-1-3 Which tab displays the customer's price list?

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3-1-4 Which two types of addresses are needed in a customer master?

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Is the bill-to address the same as any of the ship-to addresses?

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3-1-5 Check the payment terms for the customer and view the definition behind the payment terms.
Choose the ***Payment Terms*** tab.
What payment terms are shown?

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Choose the ***Link Arrow*** to view the definition.

What window opens? What type of data is this?

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3-1-6 In addition to customers, what other types of business partners are maintained in the Business Partner Master window?

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3-2 Create a sales quotation for this customer.

3-2 Open the Sales Quotation window and search for the customer.

Tip: You can use the menu path or open the transaction from the ***Common Functions*** cockpit widget.

Use one of the two methods below to search for the customer Parameter Technology.

Option 1: Choose the **Tab key** in the **Customer *(Number)*** field, and the *List of Business Partners* window opens. Double-click on the ***BP Name*** column header and enter **P** into the ***Find*** field**.** The system positions on the first entry beginning with **P**.

Option 2: Enter **P*** into the ***(Customer) Name*** field, choose the **Tab key**, and the ***Choose from List*** window opens. The system positions directly on the first entry beginning with **P** and only displays the entries beginning with **P**.

Enter the following information in the sales quotation.

Field Name or Data Type	**Values**
Item No.	**C00003**
Quantity	**5**
Item No.	**C00004**
Quantity	**10**
Item No.	**C00005**
Quantity	**5**

Tip: You can choose multiple items at the same time by highlighting the first item then choosing Shift + Click to choose several items in a row. You can use Control + Click to select individual items. Once multiple items are selected, use the ***Choose*** button to add them to the document.

3-2-2 You would like to subtotal the first three items in the document.

Note: If the *Type* indicator does not appear in the rows, choose the *Form Settings* icon and select *Type* in the *Table Format* tab.

Add a row with a subtotal for the order.

Field Name or Data Type	**Values**
Type	**Subtotal**

3-2-3 Add two additional items to the order. Make the second item an alternate for the first item by choosing *Alternative* in the *type* field.

Add two additional items to the order.

Field Name or Data Type	**Values**
Item No.	**A00005**
Quantity	**2**
Item No.	**A00004**
Quantity	**2**

Add a text line to the order. And follow that with a second subtotal row.

Field Name or Data Type	**Values**
Row Type	**Text**
Text Editor	**Any text**
Row Type	**Subtotal**

3-2-4 You would like to give the customer a large discount in the sales quotation but you need to check some information with your manager before finalizing the quotation. Save the quotation as a draft so that you can make changes before you add it as a regular document.

Note the document number for the draft sales quotation:

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3-2-5 Find the sales quotation draft in the list of draft documents.

3-2-6 Enter a 2% discount for the entire document and choose ***Add*** to save the sales quotation as a regular document.

Field Name or Data Type	**Values**
Discount	**2**

Note the sales quotation document number:

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3-3 Find all the sales quotations for the customer using Drag and Relate.

3-3-1 Go to the ***Drag & Relate*** menu.

Use one of these two methods to find the sales quotations.

Option 1: Double-click *Sales Quotation*. **All** sales quotations are displayed. Therefore, use the **Filter** function to select the sales quotations only for the customer C23900. The Filter icon is the bottom right of the ***Drag & Relate – Sales Quotation*** window. For the Customer/Vendor row, choose **Equal** in the ***Rule*** column and then enter **C23900** in the ***Value from*** column. Choose **OK.**

Option 2: Double-click *Business Partners*. All business partners display. **Drag** business partner **C23900** to the Drag & Relate menu item *Sales Quotation*, so you get only sales quotations for the customer C23900.

3-3-2 Open your sales quotation in the list.

3-4 The customer has decided to buy all the items that were quoted to him. He does not want the alternate item.

3-4-1 Copy the information in the sales quotation to a sales order.

3-4-2 Is the alternate item copied? _____________________________

3-4-3 The customer gives you a purchase order number of TX-5757. Add this number in the Customer Reference Number field. Enter today's date as the delivery date for the sales order. Then save the sales order.

Field Name or Data Type	**Values**
Customer Ref. No.	**TX-5757**
Delivery Date	***(The asterisk brings in today's date)**

Sales Order ________________

3-4-4 The customer has called back and asked you to delete the item C00003. Make the change in the sales order you just created.

3-4-5 Show the history of the document changes in the change log.

You can double-click on the rows to show different versions of the document.
You can highlight the first row and choose ***Show Difference*** to see the previous and new values for each changed field.

3-5 Optional exercise to explore available options in documents.

3-5-1 Find and duplicate the sales order.

3-5-3 Make one or more of the following changes to the sales order: add a row, delete a row or duplicate a row. Change the item description for one of the items.

Data → Add Row or ***Right mouse-click → Add Row.***

Data → Delete Row or ***Right mouse-click → Delete Row.***

Data → Duplicate Row or ***Right mouse-click → Duplicate Row***

After changing the item description, select **Ctrl+Tab** in order to leave the field.

3-5-3 Try to add an alternate item. What happens?

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3-5-4 Open the row details for the first row by selecting the row number of the first item. View the warehouse quantities by navigating to the Whse field and choosing **Ctrl + Tab**.

In stock: ____________
Ordered: ___________
Committed: __________

3-5-5 Cancel the duplicate sales order without saving.