

SD/Logistics Customer Master

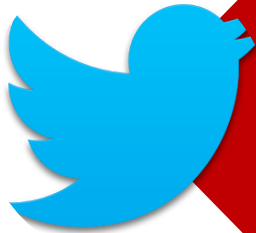
Sigrid Kok | Winshuttle



Introduction



App – Winshuttle



#WUG2014 – Twitter



SSID – Winshuttle
Password – wug2014



Customer Master Topics



Aren't we all in business to have Customers buy stuff from us?

We'll have happy customers that pay on time if their data is accurate to:

- Create Customer with associated data quickly
- Know how to Contact them
- Know their latest correct shipping address
- Able to define and update Business Partners
- Keep pricing, delivery, billing & credit up to date

How about you? What do you create/change often?



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate Check
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Form Examples



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate Check
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Takeaways:

- Query to see if Customer Exists
- Validation
- Quickly create customer
- Custom error message

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Form Examples



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate Check
- **Linked**
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Takeaways:

- Simple scripts
- Easy Linking
- Ensures all SAP actions are performed at the same time
- Easy blocking/unblocking

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Form Examples



Customer Master Topics



Create Customer Linked

- Create Customer with D
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Update Customer

- **Contacts – Round Trip**
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Form Examples

Takeaways:

- Extract currently loaded contacts
- Leverage Left Outer Join in case address not defined
- Use Position to find right one
- Backup Sheet



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate Check
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Takeaways:

- GUI Scripting with Indexed IF to find the right line to Update
- Works for updating as well as setting tax class for new Country

Update Customer

- Contacts – Round Trip
- **Update Tax Class by Country**
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Form Examples



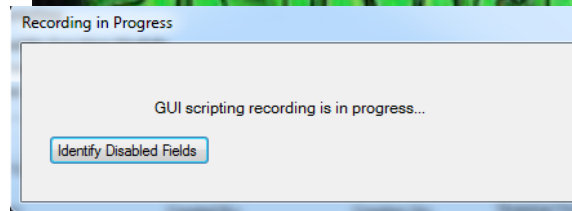
GUI Scripting



Does “GUI” scripting make you feel like you were “slimed”?

A few tips:

- Indexed Loop – for each row
- Indexed IF – for each field based on a column value
- Use Identify Disabled Fields if the field is disabled. ONLY turn it ON for the one field.



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate Check
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- **Query/Update Customer Sales Data**
 - **Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms**
- Add Business Partners

Takeaways:

- Extract current sales data
- Update Sales Area fields all at once, ex: payment terms, sales office, delivery priority, etc
- Backup Sheet

Form Examples



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate Check
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- **Add Business Partners**

Form Examples

Takeaways:

- GUI Scripting with Indexed Loop to find next open line
- or
- Find last BP (like SH 99999999) and enter on last line



Customer Master Topics



Create Customer Linked

- Create Customer with Duplicate
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Takeaways:

- Can leverage Excel scripts as web services – no programming!
- Form can leverage standard web services for validation, such as address – OR – leverage Address Helper Element (Google API)

Form Examples



Customer Master Topics - Review



Create Customer Linked

- Create Customer with Duplicate Check
- Linked
 - Create Customer
 - Create Credit Master
 - Customer Blocks

Update Customer

- Contacts – Round Trip
- Update Tax Class by Country
- Query/Update Customer Sales Data
 - Delivery Priorities, Shipping Conditions, Sales District/Office/Group, Payment Terms
- Add Business Partners

Form Examples



Summary

If you can maintain your customer data, quickly, easily & accurately



You'll have happy customers...and profits!



Questions?





WINSHUTTLE™