

Create Customer Master Record in SAP (Customer Master Data)

What is customer master record in SAP?

Definition – Both financial accounting module (SAP FI) and sales & distribution module (SAP SD) uses **customer master record in SAP**. The customer master database contains the information about the customers and this information is stored in individual customer master records in SAP. For each customer we have to specify a number and maintain corresponding details of customer.

The data in *customer master records* enables to control how the transactions data is to be posted and processed for a customer. Master records are divided into the following areas.

- General data
- Company code data
- Sales area data

During sales transactions, the [SAP system](#) automatically determines the details of customer from the customer master record.

How to create customer master data in SAP

Customer master data in SAP can be created using menu path or transaction code XD03.

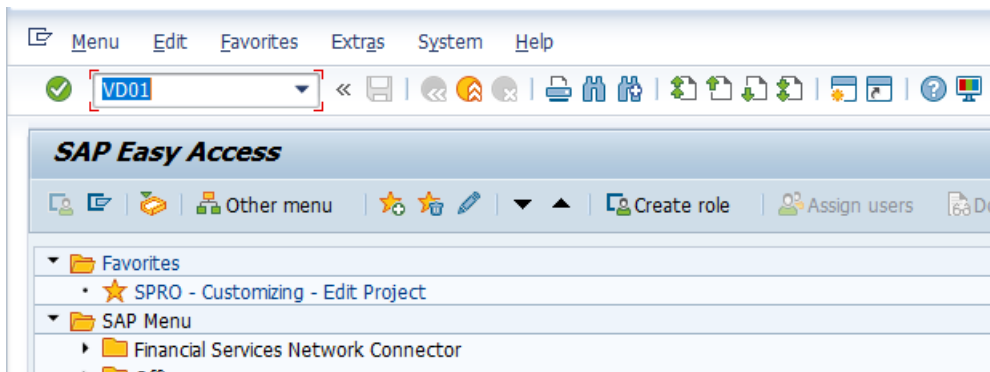
Navigation

SAP R/3 Role Menu	Create customer master record
Transaction Code	VD01, XD01
SAP menu path	SAP Menu => Logistics => Sales & Distribution => Master data => Business partner => Customer => Create => VD01 – Sales and Distribution

- Transaction code VD01 create general and sales & distribution views of customer master data. IF you create customer master data using tcode VD01, than it can only be used in SD
- Transaction code XD01 creates general and central customer master views of the customer master data. It can be used in SD as well as in Finance.

Configuration Steps

Step 1: – Execute tcode “VD01” on SAP easy access screen.



Step 2 : – The initial screen of **customer create** appears, update the following details.

Account group : – It controls view and fields, specify the customer account group key.

Customer : – You can keep this field as blank, so the system automatically generates the customer number on basis of customer number range interval.

Company Code : – Update the company code with which customer executes business transactions.

Sales Org : – Specify the sales organization code with which the customer executed the sales transactions.

Dist_Channel : – Specify the distribution channel code with which the customer executes the sales transactions.

Division : – Update the division code with which the customer executes the sales transactions.

Note : – If you get an error as sales area is not defined for customers, define sales area with the combination of sales organization, distribution channel and division.

Step 3 : – On **create customer: general data** screen, update the following details.

Address : – Update customer title, name of customer, address details and communication details like mail id, telephone number, fax number, etc.

The screenshot shows the 'Create Customer: General Data' form with the 'Address' tab selected. The 'Customer' dropdown is set to 'INTERNAL'. The 'Name' section includes a 'Title' dropdown set to 'Company' and a 'Name' text field containing 'TM Software Solutions'. The 'Search Terms' section has a 'Search term 1/2' field with 'TM'. The 'Street Address' section includes 'Street/House number' (Electronic City), 'Postal Code/City' (560100 Bangalore), 'Country' (IN), and 'Region' (10). The 'PO Box Address' section has a 'PO Box' field.

Create Customer: General Data	
Other Customer Sales Area Data ETM Data Additional Data, Empties Additional Data, DSD	
Customer: INTERNAL	
Address Control Data Marketing Unloading Points Export Data Contact Person	
Preview Internat. versions	
Name	
Title	Company
Name	TM Software Solutions
Search Terms	
Search term 1/2	TM
Street Address	
Street/House number	Electronic City
Postal Code/City	560100 Bangalore
Country	IN
Region	10
PO Box Address	
PO Box	

Marketing : – Update the required details of customer like customer classification, industry type, etc.

The screenshot shows the 'Create Customer: General Data' form with the 'Marketing' tab selected. The 'Classification' section includes 'Nielsen ID' (04), 'Customer class.' (04), 'Industry' (), 'Industry Code 1' (), 'Regional Market' (), and 'Hierarchy assignment' (). The 'Key Figures' section includes 'Annual sales' () and 'Employees' (). The 'Sales prospecting' section includes 'Legal status' ().

Create Customer: General Data	
Other Customer Sales Area Data ETM Data Additional Data, Empties Additional Data, DSD	
Customer: INTERNAL TM Software Solutions Bangalore	
Address Control Data Marketing Unloading Points Export Data Contact Person	
Classification	
Nielsen ID	04
Customer class.	04
Industry	
Industry Code 1	
Regional Market	
Hierarchy assignment	
Key Figures	
Annual sales	
Employees	
Sales prospecting	
Legal status	

Unloading Points : – Specifies the location at which the goods are to be unloaded for the customer.

Create Customer: General Data

Other Customer Sales Area Data ETM Data Additional Data, Empties Additional Data, DSD Sales Area Information, DSD

Customer INTERNAL TM Software Solutions Bangalore

Address Control Data Marketing Unloading Points Export Data Contact Person

Unloading points

Unloading Point	De...	Cal...	Customer calendar	Goods receiving hrs
Bangalore	<input type="checkbox"/>	AJ	Arrangement yearly	
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Receiving points Departments Goods receiving hours

Step 4 : – Click on sales area data and update the following details.

Sales : – Under this sales area, update the required details of sales order, Price group, customer price procedure, customer hierarchy, etc.

Create Customer: Sales Area Data

Other Customer General Data ETM Data Additional Data, Empties Additional Data, DSD

Customer INTERNAL TM Software Solutions Bangalore

Sales Org. TKSO TK Sales Org India

Distr. Channel 21 Wholesale

Division 4D Accessories

Sales Shipping Billing Documents Partner Functions

Pricing/Statistics

Price group ☐

Cust.pric.proc. ☐

Price List ☐

Cust.Stats.Grp ☐

Agency business

☐ Relevant for agency business ☐ Doc. Index Active

Customer hierarchy

Hierarchy type ☐

Higher-level customer

Valid from 27.08.2017 Valid to 31.12.9999

Shipping : – Under shipping update delivery priority, shipping conditions, delivery plant, etc.

Create Customer: Sales Area Data

Other Customer General Data ETM Data Additional Data, Empties Additional Data, DSD

Customer: INTERNAL TM Software Solutions Bangalore

Sales Org.: TKSO TK Sales Org India

Distr. Channel: 21 Wholesale

Division: 4D Accessories

Sales Shipping Billing Documents Partner Functions

Shipping

Delivery Priority: 2 Normal ☒ Order Combination

Shipping Conditions: 02 Standard

Delivering Plant: TKBL TKBL-Bangalore Plant

☐ Relevant for POD

POD timeframe:

Partial deliveries

☐ Complete delivery required

Partial delivery per item: Partial delivery allowed

Max. partial deliveries: 9

☐ Unlimited tol.

Underdel. Tolerance:

Overdeliv. Tolerance:

General transportation data

After updating all the details for customer master data, click on save button and save the details. Now you get a successful message as

☒ Customer 0000500001 was created for sales area TKSO 21 4D

Successfully we have created Customer Master Record in SAP.

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SAP SD Enterprise Structure

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» [SAP SD - Define Sales Group](#)

» [SAP SD - Define Sales Area](#)

» [SAP SD - Define Company Code](#)

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SAP SD - Assignment of Organizational Units

↳ SAP SD - Assigning a Sales Organization to a Company Code

↳ Assigning a Distribution Channel to a Company Code

↳ SAP SD - Assigning a Division to a Sales Organization

↳ SAP SD - Assigning a Sales office to a Sales Area

↳ SAP SD - Assigning a Sales Group to a Sales Office

↳ SAP SD - Assigning a Sales Area to Credit Control Area

↳ SAP SD - Define sales area

SAP SD Customer Master Data

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↳ SAP SD - Create sundry debtors accounts

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SAP SD Pricing & Tax Determination

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↳ SAP SD - Maintain condition tables

↳ SAP SD - Maintain access sequences

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SAP SD Sales Documents

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SAP TCodes

» SAP TCodes

» SAP SD TCodes