

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.

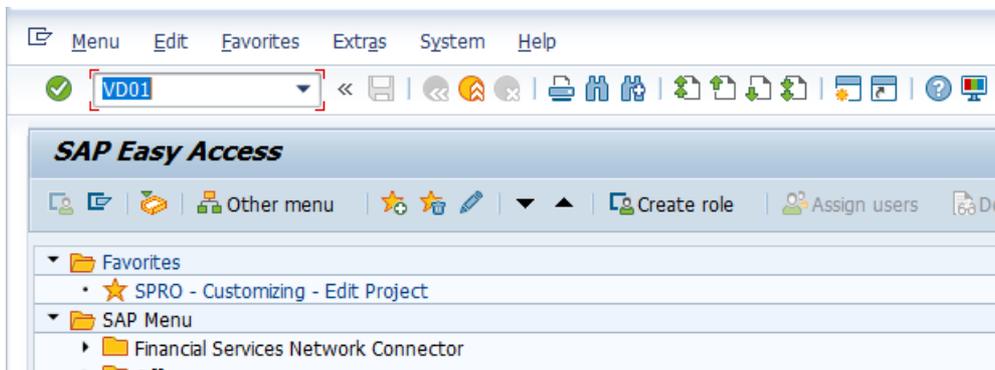
Navigation

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.

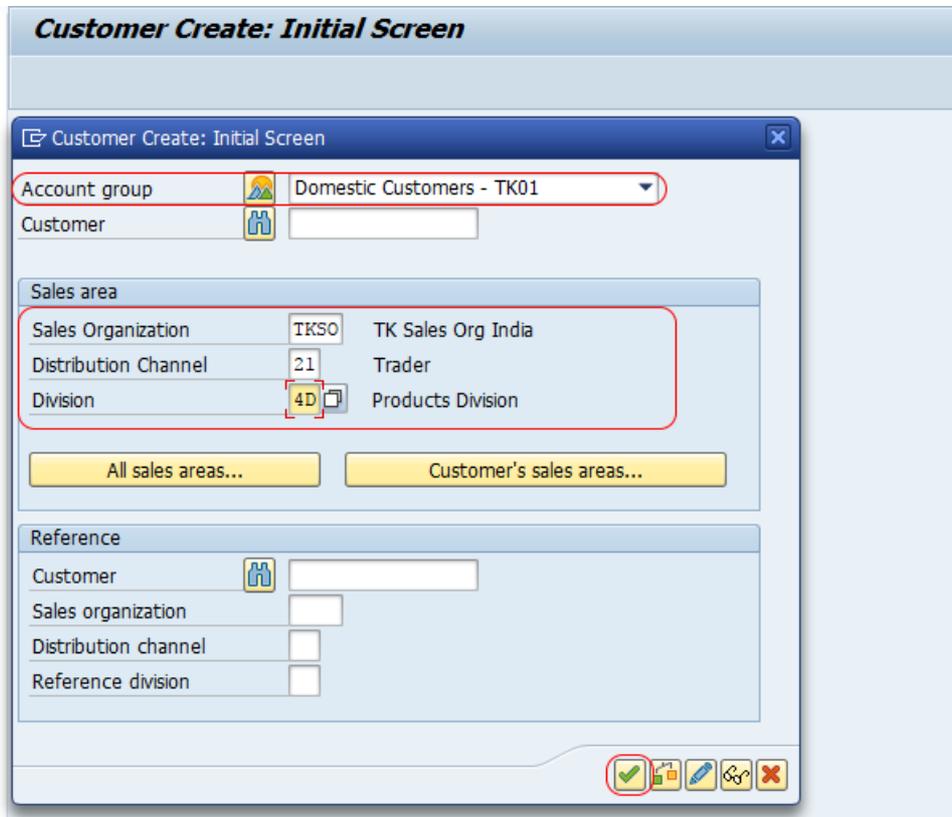
Customer : – You can keep this field as blank, so the system automatically generates the customer number on basis of customer number range interval.

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 in SAP, with the 'Address' tab selected. The form is titled 'Create Customer: General Data' and includes navigation options like 'Other Customer', 'Sales Area Data', 'ETM Data', 'Additional Data, Empties', and 'Additional Data, DSD'. The customer type is set to 'INTERNAL'. The 'Name' section includes a dropdown for 'Title' (set to 'Company') and a text field for 'Name' (set to 'TM Software Solutions'). The 'Search Terms' section has a text field for 'Search term 1/2' (set to 'TM'). The 'Street Address' section includes fields for 'Street/House number' (set to 'Electronic City'), 'Postal Code/City' (set to '560100 Bangalore'), and 'Country' (set to 'IN'). The 'Region' field is highlighted with a red box and contains the value '10'. There are also fields for 'PO Box Address' and 'PO Box'.

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

The screenshot shows the 'Create Customer: General Data' form in SAP, with the 'Marketing' tab selected. The form is titled 'Create Customer: General Data' and includes navigation options like 'Other Customer', 'Sales Area Data', 'ETM Data', 'Additional Data, Empties', and 'Additional Data, DSD'. The customer type is set to 'INTERNAL', the customer name is 'TM Software Solutions', and the location is 'Bangalore'. The 'Classification' section includes fields for 'Nielsen ID' (highlighted with a red box), 'Customer class.' (set to '04'), 'Industry', and 'Industry Code 1'. The 'Key Figures' section includes fields for 'Annual sales' and 'Employees'. The 'Sales prospecting' section includes a field for '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"/>			

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: 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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