Copy Controls within SD

Purpose

This document will provide a general overview of copy controls within sales and distribution.

What Are Copy Controls?

Copy Controls are short programs that are used when copying from one document to another. They consist of programs known as routines that inform the system how the data is to be copied from the source document to the target document.

The standard system already contains a number of these routines. However, it is possible to generate additional routines to fulfill business requirements not reached within the standard delivered system.

Where are they found?

The Copy Controls are configured within the IMG. They can be located through the following menu paths:

- Sales and Distribution -> Sales -> Maintain copy control for sales documents, or
- Sales and Distribution -> Shipping -> Specify copy control for deliveries, or
- Sales and Distribution -> Billing -> Billing Documents -> Maintain copy control for billing

Or alternatively, they can be accessed directly by using the following transaction codes:

- VTAA - control for copying from sales order to sales order
- VTLA - control for copying from sales order to delivery
- VTAF - control for copying from billing doc to sales order
- VTFA - control for copying from sales order to billing doc
- VTFL - control for copying from delivery to billing doc
- VTFF - control for copying from billing doc to billing doc

How do they work?

You can use an existing SD document as the basis for creating a subsequent document; for example, when creating a sales order with reference to a quotation. In this case the system can copy all the data or only certain data from the quotation into the sales order. Which fields are to be copied from the source document (quotation) depends on how the copy controls have been configured.
Copy controls are setup at three levels of the sales order; Header level, Item level and Schedule line level. The Schedule line level is only relevant when copying from sales order to sales order or from billing doc to sales order.

The Header Copy Routines are used to copy data from the Header of the Source document to the Header of the Target document. A number of copy routines are required; one for General Header data, one for Partner data, etc.

It is possible to view the source code for each routine by using the F4 help function. Highlight the appropriate routine and press the ‘source text’ (F5) button to display the code through the ABAP editor.

Copy controls for the item level can be accessed by opening the ‘Item’ folder in the dialog structure and selecting an item category from the’ Display View "Item": Overview’ screen. Again there are several routines used here for the item level copy controls. F1 help can be utilised to get a better understanding on how each routine is employed.

It is worth noting, if there is a proposed item category on the target sales doc type, then this will be the item category in the target sales document. However, if the field is left blank, then the system will use the customer defined configuration in transaction VOV4 to determine the appropriate item category.
In addition to the copy routines there are a number of check box controls; for example ‘Complete reference’ at header level and ‘Copy quantity’ at Item level. F1 can again be used here to add further insight into the role of each of these fields.

At the lowest level, the Schedule Line copy control routines can be accessed by double clicking on the ‘Schedule Line’ folder in the dialog structure when the appropriate Item category has been selected. The schedule line routines work similar to the header and item category routines detailed previously.

Reference Status

Documents that have been copied are assigned an updated reference status in the copied item.

An item can have the following status:

- Not relevant – the item is not relevant for copying
- Not referenced - The item has not yet been copied.
- Partially referenced - The entire item quantity was not copied.
- Fully referenced - The entire item quantity has been copied or the entire item quantity has not been copied, but the item cannot be referenced further.

To display the reference status:

- Selecting Header -> Status for the status of the entire document. (Field VBUK-RFSTK)
- Selecting Item -> Status for the status of the line item. (Field VBUP-RFSTA)

What Fields are being copied?

Note that there are several copy routines at each level of the customising; header, item and schedule line.
Finding out which fields are being copied can be achieved by examining the source code in the ABAP Editor - transaction code SE38.

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