Copy Control Mechanism in Sales and Distribution

What is a Copy Control?

Copy Control functionality controls what data is copied from the source document to the subsequent document. For example, you can define a new sales order type and use the newly created sales order type for a new delivery order. For this purpose, you can specify a new copy control for data flow between these two sales documents. If you don’t maintain the copy control from a source document type to a target document type and try to create the target document copying from the source, the system will prompt you with an error.

There are 3 levels to execute a copy control:

- Data Transfer Routines
- Copying Requirements
- Switches

Data Transfer Routines:
Data Transfer Routines copies the data from the Source document to the Target document, but before copying, it checks whether the Copying requirements are met or not. If the Copying requirement is not met then data will not be copied, rather system may give you error, warning messages and sometime it may terminate the processing.

Copying Requirements:
Identifies a copying routine which checks that certain requirements are met when one document is copied into another.

Few examples of copying requirements are given below:

Copying requirement "001" at Header level checks that Sold-to-party and Sales area must be same in both source and target document otherwise data will not be copied.

Copying requirement "301" at Item level, checks the completion and rejection status of the item. If the item has been rejected or completed status then system will not copy the item to the target document.

Copying requirement "501" at Schedule line level checks that open quantity must be greater than zero otherwise it will not copy.

Switches:
This is used for specific control. For example you want to copy item number or not.

You can use copy control for below source and target document as below:

- Sales document type from a sales document type
- Sales document type from a billing document type
- Delivery type from a sales document type
- Billing document type from a sales document type
- Billing document type from a delivery type
- Billing document type from a billing document type

Configuration

The configuration can be accessed through the following path:
SPRO -> Sap Reference IMG ->Sales and distribution -> Sales -> Maintain copy controls for sales documents. Then choose the copy control. Let us choose sales document to sales document as an example.
The following screen appears. Select Sales document to sales document.

Specify the target sales document and source sales document.
The copy requirement can be defined for each level as follows:

**Header Level:**
- Checks whether the customer and sales area in the source document and target document are the same.
- Checking the copy item number checkbox copies the item number to the target sales document type (OR) as if it is in the source sales document type (IN).
- Checking the complete reference checkbox copies the entire source document data (IN) to the target document (OR).

**Item Level:**
- Copies the item number to the target sales document type (OR) as if it is in the source sales document type (IN).
- Checks whether the item number and description are the same.
- Checking the complete reference checkbox copies the entire source document data (IN) to the target document (OR).
The copy requirement at this level checks whether the item that is used as a copy has a reason for rejection or status completed.

- **Positive/negative quantity:**
  This indicator is used to determine how the quantity in the source document is affected. i.e., whether the quantity has a negative effect or positive effect or no effect at all.
  For example:
  - Quotation to sales order : Positive
  - Sales order to sales order : No effect
  - Contract to return : Negative

- **Copy Quantity:**
  Defines the quantity that is copied to the target document. If this is blank, the system tries to copy the best possible quantity depending on the situation.
  For example, the system would copy the open quotation quantity if you were copying from a quotation to an order, and if you were creating a credit memo, it would copy the billed quantity.

- **Pricing type:**
  Specifies how the system treats pricing data when copying documents.
  The following pricing types are available at the time of billing.
  - A: Copy pricing elements and update according to scale. The system
    1. does not determine any new condition types
    2. redetermines the scale prices for changed delivery quantities
    3. carries out completely new pricing. The system
    4. redetermines the taxes
    5. carries out a new pricing
    6. copies the manually entered pricing elements
    7. redetermines the taxes
  - B: Carry out completely new pricing. The system
  - C: Copy manual pricing elements and carry out a new pricing. The system

- **Update document flow :**
  Specifies whether the system creates document flow records when you create a sales document item with reference or an item in a subsequent document.
  Document flow records contain information about the quantities and values that have been copied from the source document to target document.

**Schedule Line category :**
Copying requirement at this level for instance can check whether only a schedule line with an open quantity greater than zero is copied.

**Transaction codes for copy controls in SD**

The T.Code for Copy Control between sales order and delivery is VTLA (Delivery with reference to an order)

The T.Code for Control between sales order and billing document is VTFA (Order related billing scenario)

The T.Code for Control between delivery and billing document is VTFL (Delivery related billing scenario)

The T.Code for Copy Control between sales order and Sales order is VTAA. It is used in the case of creating returns order/credit memo request/debit memo request.

The T.Code for Control between billing document and billing document is VTFF. It is used in the case of cancelling an invoice.

**Configuring copy controls for delivery item categories:**

IMG -> Logistics -> Shipping -> Copying control -> Specify copy control for deliveries.
The following screen appears. It consists of only two levels, Header level and Item level.

**Header Level:**
- Environment, Health & Safety
- REACH Compliance
- Sales and Distribution
- Materials Management
- **Logistics Execution**
  - Direct Store Delivery
  - Decentralized WMS Integration
  - Extended Warehouse Management Integration
  - Integration of External Warehouse Systems
  - Warehouse Management
  - Shipping
    - Basic Shipping Functions
    - Deliveries
    - Copying Control
      - Specify Copy Control for Deliveries
      - Define Copying Requirements
      - Define FORM Routines For Data Transfers
**Combination Requirement:**
Identifies a routine that checks that certain requirements are met before you can combine a number of sales orders into one delivery. You can require, for example, that the sales orders you want to combine must have the same sales organization, the same billing type, and the same partial delivery agreement.

**Data Transfer:**
**Header Data:**
According to this routine you specify, the system checks that certain sales document header fields in the source document meet the right conditions. If they do so, the system copies them into the target document.

**Item Level:**

<table>
<thead>
<tr>
<th>Dialog Structure</th>
<th>Target delivery type</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>LF</td>
<td>Promotion Order</td>
</tr>
<tr>
<td>Item</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conditions</th>
<th>Order requirements</th>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Combination requirmt</td>
<td>Combination</td>
</tr>
<tr>
<td></td>
<td>001</td>
<td></td>
</tr>
<tr>
<td></td>
<td>051</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Transfer</th>
<th>Header Data</th>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Header Data Ext. Sys</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Handling Units</td>
<td>000</td>
</tr>
</tbody>
</table>

| Control Data     | Copy item number      |                |
|------------------|------------------------|                |
The data which you need to enter will be same as like in the sales document.
The configuration path for configuring copy control for billing document is given below:

The following screen appears.

### Display IMG

#### Structure
- Flexible Real Estate Management (RE-FX)
- Logistics - General
- Environment, Health & Safety
- REACH Compliance
- Sales and Distribution
- Master Data
- Basic Functions
- Sales
- Foreign Trade/Customs
- Billing

#### Billing Documents
- Define Billing Types
- Define Number Range For Billing Documents
- Invoice Lists
- Assembling Groups
- Maintain Copying Control For Billing Documents
- Define Blocking Reason For Billing
- Define Reasons for Complaint
Choose one and proceed further. If the data needs to be copied from sales order to billing or from billing to billing or from delivery to billing, you can use this path also to configure.
Thus the basic configuration of copy controls and its purpose is explained.