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Gerard Magorrian

May 11, 2020 | 3 minute read

Copying Controls – What are they and How do they work?

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

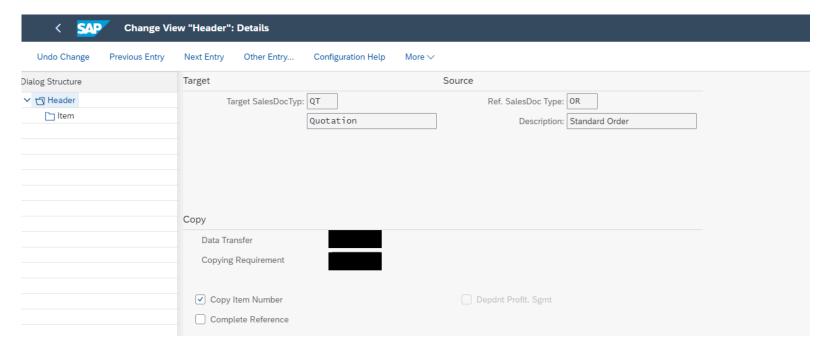
What Are Copying Controls?

Copying 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.

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

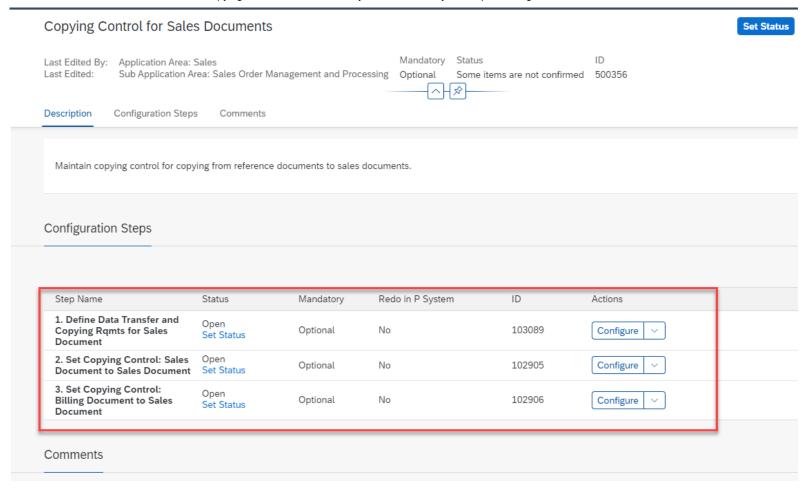
into the sales order. Which fields are to be copied from the source document (quotation) depends on how the copy controls have been configured.

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?

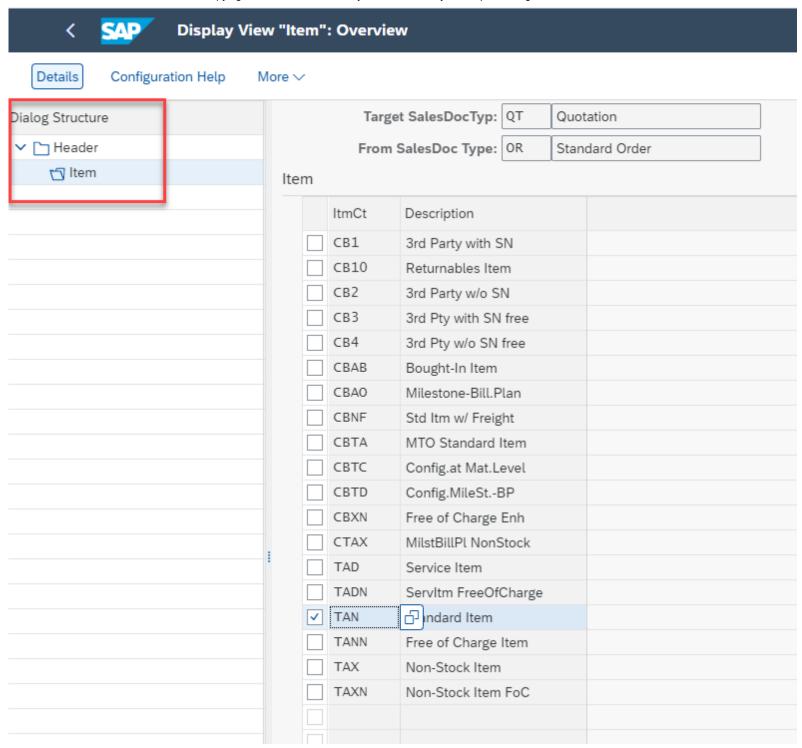
In S/4 HANA Cloud, the copying controls are predominantly pre-configured and only visible in the backend. However, it is also possible to define and assign custom routines and maintain them within the Manage Your Solution – Configuration Steps. They can be located through the following menu paths:



How do they work?

Copying controls are configured 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. In S/4HC, configuration steps offer options at both Header and Item levels.

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



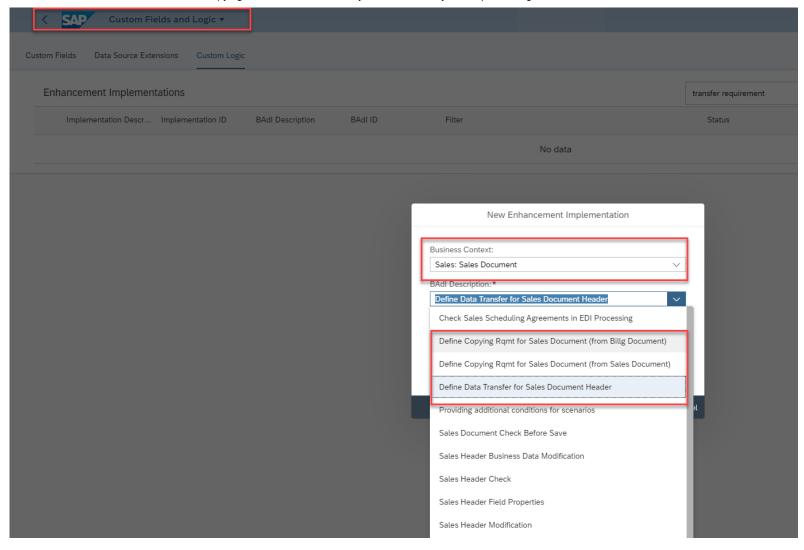
Copying controls for the item level can be accessed by opening the 'Item' folder in the dialog structure and selecting an item category from the' Display View "Item": Overview' screen.

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 blank, the system will use the customer defined configuration in Configuration step: 'Assign Item Categories' (102807) to determine the appropriate item category.

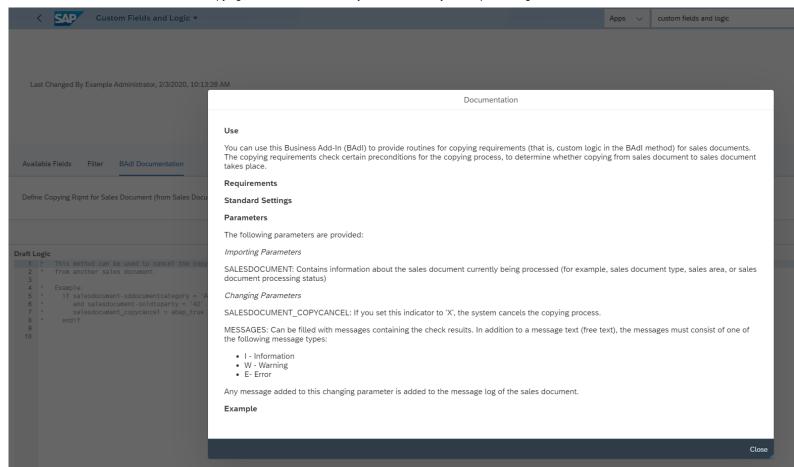
In addition to the copying routines there are a number of check box controls; for example 'Complete reference' at header level and 'Copy item number'. F1 can again be used here to add further insight into the role of each of these fields

Adding Additional Copying Control Logic

Creating custom transfer routines and adding additional logic such as info messages and error messages can be fulfilled through Extensibility implementations within the 'Custom Fields and Logic' App:



1. BAdl option – Define Copying Rqmt for Sales Document (from Sales Document):

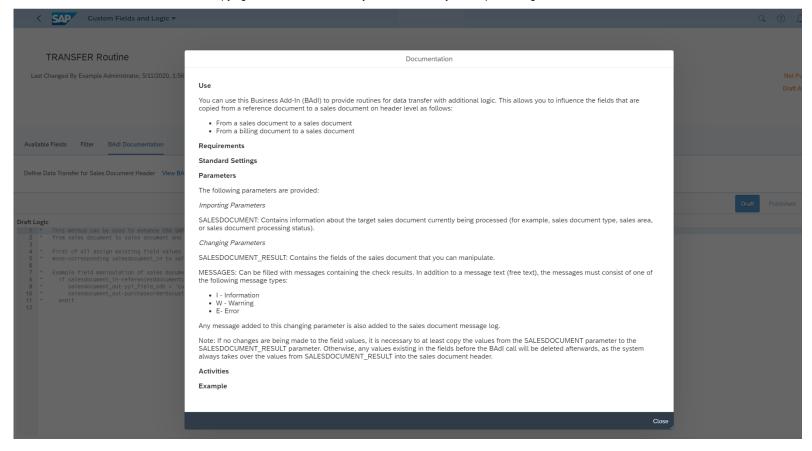


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2. BAdl option - Define Data Transfer for Sales Document Header:



Summary:

Copying Controls are short programs that are used when copying from one document to another. Within S/4 Hana Cloud you can create your own routine using 'Custom Fields and Logic' extensibility with the following impact:

- 1. Data transfer routines: Controls the copied fields using the additional custom logic.
- 2. Copying requirement routines: Checks if the reference document can be copied.

More information can be found in the link here.

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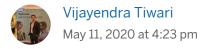


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Daiana Feiten

May 11, 2020 at 7:14 pm

Great blog Gerard! Thank you for sharing!

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Sai Giridhar Kasturi

May 12, 2020 at 3:36 am

Well documented Gerard...thanks for sharing

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Varun Agarwal

May 12, 2020 at 6:40 am

Thanks for sharing Gerard 🙂



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Morne Smart

January 25, 2021 at 5:29 am

I'm using CE2011 and I do not see the "Copy" "Data Transfer" header fields for copying control from Delivery (LF) to Billing Document (F2) like the first image in the thread (SSCUI nodes 102763). Is that expected? "Copy" "Custom Data Transfer" is available at the item level (TAN).

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