

## Community

[Ask a Question](#) [Write a Blog Post](#)[Login](#)

### Product Information



Gerard Magorrian

May 11, 2020 | 3 minute read

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

💬 5 👍 7 👁 2,281

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.

The screenshot shows the SAP 'Change View Header: Details' configuration screen. The interface includes a top navigation bar with the SAP logo and the title 'Change View "Header": Details'. Below the navigation bar are buttons for 'Undo Change', 'Previous Entry', 'Next Entry', 'Other Entry...', 'Configuration Help', and 'More'. The main area is divided into two sections: 'Target' and 'Source'. The 'Target' section shows 'Target SalesDocType: QT' and 'Quotation'. The 'Source' section shows 'Ref. SalesDoc Type: OR' and 'Description: Standard Order'. Below these sections is a 'Copy' section with two rows: 'Data Transfer' and 'Copying Requirement', each with a blacked-out field. At the bottom, there are checkboxes for 'Copy Item Number' (checked), 'Complete Reference', and 'Depdnt Profit. Sgmt'.

## 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:

[Set Status](#)

Last Edited By: Application Area: Sales

Last Edited: Sub Application Area: Sales Order Management and Processing

Mandatory: Optional

Status: Some items are not confirmed

ID: 500356

[Description](#)

[Configuration Steps](#)

[Comments](#)

Maintain copying control for copying from reference documents to sales documents.

### Configuration Steps

Step Name	Status	Mandatory	Redo in P System	ID	Actions
1. Define Data Transfer and Copying Rqmts for Sales Document	Open <a href="#" style="color: #0070C0; text-decoration: none;">Set Status</a>	Optional	No	103089	<a href="#" style="border: 1px solid #ccc; padding: 2px 5px;">Configure</a> <span style="border: 1px solid #ccc; padding: 0 5px;">▼</span>
2. Set Copying Control: Sales Document to Sales Document	Open <a href="#" style="color: #0070C0; text-decoration: none;">Set Status</a>	Optional	No	102905	<a href="#" style="border: 1px solid #ccc; padding: 2px 5px;">Configure</a> <span style="border: 1px solid #ccc; padding: 0 5px;">▼</span>
3. Set Copying Control: Billing Document to Sales Document	Open <a href="#" style="color: #0070C0; text-decoration: none;">Set Status</a>	Optional	No	102906	<a href="#" style="border: 1px solid #ccc; padding: 2px 5px;">Configure</a> <span style="border: 1px solid #ccc; padding: 0 5px;">▼</span>

### Comments

## 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.

<
SAP
Display View "Item": Overview

Details
Configuration Help
More ▾

Dialog Structure

- ▾ Header
- Item

**Target SalesDocTyp:** QT Quotation

**From SalesDoc Type:** OR Standard Order

Item

	ItmCt	Description	
<input type="checkbox"/>	CB1	3rd Party with SN	
<input type="checkbox"/>	CB10	Returnables Item	
<input type="checkbox"/>	CB2	3rd Party w/o SN	
<input type="checkbox"/>	CB3	3rd Pty with SN free	
<input type="checkbox"/>	CB4	3rd Pty w/o SN free	
<input type="checkbox"/>	CBAB	Bought-In Item	
<input type="checkbox"/>	CBAO	Milestone-Bill.Plan	
<input type="checkbox"/>	CBNF	Std Itm w/ Freight	
<input type="checkbox"/>	CBTA	MTO Standard Item	
<input type="checkbox"/>	CBTC	Config.at Mat.Level	
<input type="checkbox"/>	CBTD	Config.MileSt.-BP	
<input type="checkbox"/>	CBXN	Free of Charge Enh	
<input type="checkbox"/>	CTAX	MilstBillPl NonStock	
<input type="checkbox"/>	TAD	Service Item	
<input type="checkbox"/>	TADN	ServItm FreeOfCharge	
<input checked="" type="checkbox"/>	TAN	Standard Item	
<input type="checkbox"/>	TANN	Free of Charge Item	
<input type="checkbox"/>	TAX	Non-Stock Item	
<input type="checkbox"/>	TAXN	Non-Stock Item FoC	
<input type="checkbox"/>			
<input type="checkbox"/>			

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:

The screenshot shows the SAP S/4HANA 'Custom Fields and Logic' interface. The top navigation bar includes a back arrow, the SAP logo, and a dropdown menu labeled 'Custom Fields and Logic'. Below this, there are tabs for 'Custom Fields', 'Data Source Extensions', and 'Custom Logic'. The main area is titled 'Enhancement Implementations' and contains a table with columns: 'Implementation Descr...', 'Implementation ID', 'BApI Description', 'BApI ID', 'Filter', and 'Status'. The table is currently empty, displaying 'No data'. A modal dialog titled 'New Enhancement Implementation' is open in the foreground. It has a 'Business Context' dropdown set to 'Sales: Sales Document'. Below it is the 'BApI Description' field, which is required (marked with an asterisk). A dropdown menu is open for 'BApI Description', showing several options. The option 'Define Copying Rqmt for Sales Document (from Sales Document)' is highlighted with a red box. Other options include 'Define Data Transfer for Sales Document Header', 'Check Sales Scheduling Agreements in EDI Processing', 'Providing additional conditions for scenarios', 'Sales Document Check Before Save', 'Sales Header Business Data Modification', 'Sales Header Check', 'Sales Header Field Properties', and 'Sales Header Modification'.

Custom Fields and Logic

Custom Fields Data Source Extensions Custom Logic

Enhancement Implementations

Implementation Descr... Implementation ID BApI Description BApI ID Filter Status

No data

transfer requirement

New Enhancement Implementation

Business Context:

Sales: Sales Document

BApI Description: \*

Define Data Transfer for Sales Document Header

Check Sales Scheduling Agreements in EDI Processing

Define Copying Rqmt for Sales Document (from Billg Document)

Define Copying Rqmt for Sales Document (from Sales Document)

Define Data Transfer for Sales Document Header

Providing additional conditions for scenarios

Sales Document Check Before Save

Sales Header Business Data Modification

Sales Header Check

Sales Header Field Properties

Sales Header Modification

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

The screenshot shows the SAP Custom Fields and Logic interface. The top bar includes the SAP logo, the title 'Custom Fields and Logic', and a dropdown menu for 'Apps' with the selected item 'custom fields and logic'. Below the top bar, it indicates 'Last Changed By Example Administrator, 2/3/2020, 10:13:28 AM'. The main area has tabs for 'Available Fields', 'Filter', and 'BAdI Documentation'. The 'BAdI Documentation' tab is active, showing the 'Define Copying Rqmt for Sales Document (from Sales Document)' BAdI. A 'Draft Logic' section on the left shows a code snippet for canceling a copy. A 'Documentation' pop-up window is open on the right, providing details about the BAdI's use, requirements, standard settings, parameters, and an example.

**Documentation**

**Use**

You can use this Business Add-In (BAdI) to provide routines for copying requirements (that is, custom logic in the BAdI method) for sales documents. The copying requirements check certain preconditions for the copying process, to determine whether copying from sales document to sales document takes place.

**Requirements**

**Standard Settings**

**Parameters**

The following parameters are provided:

**Importing Parameters**

SALESDOCUMENT: Contains information about the sales document currently being processed (for example, sales document type, sales area, or sales document processing status)

**Changing Parameters**

SALESDOCUMENT\_COPYCANCEL: If you set this indicator to 'X', the system cancels the copying process.

MESSAGES: Can be filled with messages containing the check results. In addition to a message text (free text), the messages must consist of one of the following message types:

- I - Information
- W - Warning
- E- Error

Any message added to this changing parameter is added to the message log of the sales document.

**Example**

Close

Follow

Like

RSS Feed

## 2. BAdI option – Define Data Transfer for Sales Document Header:

The screenshot displays the SAP 'Custom Fields and Logic' configuration page for a 'TRANSFER Routine'. The main window is titled 'Documentation' and contains the following sections:

- Use:** You can use this Business Add-In (BAI) to provide routines for data transfer with additional logic. This allows you to influence the fields that are copied from a reference document to a sales document on header level as follows:
  - From a sales document to a sales document
  - From a billing document to a sales document
- Requirements:**
  - Standard Settings:**
  - Parameters:** The following parameters are provided:
    - Importing Parameters:** SALESDOCUMENT: Contains information about the target sales document currently being processed (for example, sales document type, sales area, or sales document processing status).
    - Changing Parameters:** SALESDOCUMENT\_RESULT: Contains the fields of the sales document that you can manipulate.
- MESSAGES:** Can be filled with messages containing the check results. In addition to a message text (free text), the messages must consist of one of the following message types:
  - I - Information
  - W - Warning
  - E - Error
- Activities:**
- Example:**

Additional text in the documentation includes: 'Any message added to this changing parameter is also added to the sales document message log.' and a note: 'Note: If no changes are being made to the field values, it is necessary to at least copy the values from the SALESDOCUMENT parameter to the SALESDOCUMENT\_RESULT parameter. Otherwise, any values existing in the fields before the BAI call will be deleted afterwards, as the system always takes over the values from SALESDOCUMENT\_RESULT into the sales document header.'

In the background, the 'Draft Logic' section shows a code editor with the following logic:

```

1 * This method can be used to enhance the SAP
2 * from sales document to sales document and
3
4 * First of all assign existing field values
5 * move-corresponding salesdocument_in to sal
6
7 * Example field manipulation of sales docum
8 * if salesdocument_in-referencesddocumentd
9 *   salesdocument_out-yy1_field_sdh = 'cu
10 *   salesdocument_out-purchaseorderbycust
11 *   endif.
12

```

## 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](#).



Alert Moderator

### Assigned tags

[SAP S/4HANA Cloud for Sales](#)

### Similar Blog Posts



[Requested Delivery Date is accepted on a non-working day](#)

By [Gerard Magorrian](#) Sep 11, 2020

[How to use “Manage Prcies – Sales” app](#)

By [Shirley Wu](#) Aug 16, 2019

[Billing Split for Delivery Order](#)

By [Chen Feng](#) May 22, 2020

### Related Questions



[What's the difference between notification service and replication service in Sales APIs?](#)

By Former Member Nov 13, 2020

### [Data transfer routines @ sales order item level](#)

By [Sarah Vansighem](#) May 06, 2020

### [Intercompany billing for consignment issue flow](#)

By [Artjom Artjomov](#) Jun 03, 2019

## Join the Conversation



### [SAP TechEd](#)

Tune in for tech talk. Stay for inspiration. Upskill your future.



### [Coffee Corner](#)

Join the new Coffee Corner Discussion Group.

## 5 Comments

You must be [Logged on](#) to comment or reply to a post.



[Vijayendra Tiwari](#)

May 11, 2020 at 4:23 pm

Thank for sharing this from cloud perspective!

Like 1 | [Share](#)



**Daiana Feiten**

May 11, 2020 at 7:14 pm

Great blog Gerard! Thank you for sharing!

Like 1 | [Share](#)



**Sai Giridhar Kasturi**

May 12, 2020 at 3:36 am

Well documented Gerard...thanks for sharing

Like 1 | [Share](#)



**Varun Agarwal**

May 12, 2020 at 6:40 am

Thanks for sharing Gerard 😊

Like 1 | [Share](#)

**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).

Like 0 | [Share](#)

### Find us on

[Privacy](#)[Terms of Use](#)[Legal Disclosure](#)[Copyright](#)[Trademark](#)[Cookie Preferences](#)[Newsletter](#)[Support](#)