

Sales and Distribution (SD)



MYSAP.ROLES_S_SD

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Sales and Distribution (SD)

In the following, you can find the singles roles for the “Sales and Distribution (SD)” components.

Inquiry Processing

Inquiry Processing

SAP_LO_SD_INQUIRY_PROCESSING

Tasks

This role contains all the functions which you need for processing inquiries.

Activities in Sales and Distribution Processing (SD)

- Create/change/display inquiries
- Generate lists for inquiries and incomplete inquiries
- Select sales documents according to object status

Quotation Processing

SAP_LO_SD_QUOTATION_PROCESSING

Tasks

This role contains all the functions which you need for processing quotations.

Activities in Sales and Distribution Processing (SD)

- Create/change/display quotations
- Generate lists for quotations and incomplete quotations
- Select sales documents according to object status

Contract Processing

Contract Processing

SAP_LO_SD_CONTRACT_PROCESSING

Tasks

This role contains all the functions which you need for processing contracts (for example, group contracts, value contracts, quantity contracts, service contracts). This also includes the generation of lists with contracts according to various criteria. From the lists, you can then go to processing.

Activities in Sales and Distribution Processing (SD)

The following activities for contracts are available to you with this role:

- Create/change/display contracts
- Generate and process list of contracts
- Generate and process list of incomplete contracts
- Select sales documents according to object status

Integration

You need material and customer information for processing material and customer information. For example, you work with the customer hierarchy for value contracts. The roles [Display Customer and Material Information \[Page 14\]](#) (SAP_LO_SD_INFORMATION_DISPLAY) and [Maintain Customer and Material Information \[Page 18\]](#) (SAP_LO_SD_INFORMATION_PROCESSING) contain all the functions you need in order to display or maintain customer-specific information and material information about the customer. The role [Maintain Pricing \[Page 20\]](#) (SAP_LO_SD_PRICING_MAINTAIN) contains functions for maintaining pricing.

Sales Order Processing

SAP_LO_SD_SALES_ORD_PROCESSING

Tasks

This role contains all the functions you need for processing sales orders. Alongside sales order processing, it is possible to generate lists with sales orders according to various criteria. From the lists, you can then go to sales order processing.

Activities in Sales and Distribution Processing (SD)

- Create/change/display sales orders
- Generate and process list of sales orders
- Generate and process list of incomplete sales orders
- Select and process sales documents according to object status
- Select and process sales documents in a period of time
- Select and process duplicate sales documents in a period of time

Scheduling Agreement Processing**Scheduling Agreement Processing**

SAP_LO_SD_SCHED_AGR_PROCESSING

Tasks

This role contains all the functions you need for processing [Scheduling Agreements \[Ext.\]](#) This includes processing scheduling agreements and generating a list for incomplete scheduling agreements. The incomplete scheduling agreements can be processed from the list.

Activities in Sales and Distribution Processing (SD)

- Scheduling agreement processing
- Select and process incomplete scheduling agreements
- Select sales documents according to object status

Returns Processing

SAP_LO_SD_RETURN_PROCESSING

Tasks

If a customer sends back damaged goods, or goods that were delivered as samples, you can enter a return, and subsequently execute a new delivery.

This role contains all the functions you need for processing returns and delivering goods.

Returns are displayed in the SAP System as a special sales document type. Working with returns takes place using the general transaction for sales order processing.

Activities in Sales and Distribution Processing (SD)

- Create/change/display sales orders
- Create/change outbound delivery

Rebate Processing

Rebate Processing

SAP_LO_SD_REBATE_PROCESSING

Tasks

Particular discounts which granted to the customer depending on his sales volume, are defined in the SAP System as rebate agreements.

This role contains functions for processing rebate agreements and displaying and updating billing documents.

Activities in Sales and Distribution Processing (SD)

Rebate processing:

- Maintain rebate agreements
- Extend rebate agreement
- Settlement of rebate agreements
- Generate list of rebate agreements

Billing document:

- Display billing document
- Compare the rebate basis from billing documents and statistics
- Update billing documents referring to rebate conditions

Integration

The volume-based rebate differs from other discounts in that it is based on the customer's sales volume within a specific period of time, and is paid subsequently. The system processes a volume-based rebate in the same way as other price elements. Volume-based rebates are saved in condition records. Control of rebate processing is carried out using condition types, pricing procedures and access sequences. This control data is defined in Customizing for Sales. Rebate agreement types must also be pre-defined in Customizing for Sales. The role [Customizing Project Employees \[Ext.\]](#) (SAP_BC_CUS_CUSTOMIZER) is available to you for functions.

The role [Billing Processing \[Page 15\]](#) also contains functions which, if necessary, can be combined with the role rebate processing.

Sales Deal and Promotion Processing

SAP_LO_SD_DEALS_PROMOTI_PROCES

Tasks

This role contains all the functions you need for processing sales deals and promotions.

With promotions and sales deals, you can implement marketing programs with broadly created discount structures.

A promotion usually portrays a general marketing plan for a specific product or a product group, for example, a promotion for a series of products during a sales season. A promotion can include several different sales deals.

Activities in Sales and Distribution Processing (SD)

The following activities for sales deals and promotions are available to you with this role:

- Create/change/display sales deals
- Generate list of sales deals
- Create/change/display promotions
- Generate list of promotions

Integration

Before you can create promotions and sales deals as master data in the system, you first have to define the agreement types you want to use. Types of promotions and sales deals are defined exactly as rebate agreement types in Customizing for Sales and Distribution. For example, you can create different sales deals to differentiate between different product groups. The role [Customizing Project Employees \[Ext.\]](#) (SAP_BC_CUS_CUSTOMIZER) is available to you for functions in Customizing.

Display Customer and Material Information**Display Customer and Material Information**

SAP_LO_SD_INFORMATION_DISPLAY

Tasks

This role contains functions for displaying information on materials (for example, master record, material listing, exclusion, cross selling materials, sales deals, promotions), for displaying customer-specific information (for example, master record, customer hierarchy, value contracts for the customer, rebate agreements), and customer material info records.

Activities in Sales and Distribution Processing (SD)

- Display customer (Sales)
- Display material
- Display material listing/exclusion
- Select customer material info record according to customer
- Select customer material info record according to material
- Display customer hierarchy
- Display sales deals
- Display promotions
- Display rebate agreements
- Display cross selling materials
- Display assortment module for value contracts

Billing Processing (online)

SAP_LO_SD_BILLING_PROCESSING

Tasks

This role groups together functions for online billing processing (invoices, credit memos, debit memos), and retroactive billing. Retroactive billing can then be included if price agreements have an effect on billing documents which have already been settled.

Activities in Sales and Distribution Processing (SD)

- Create/change/display billing document
- Cancel billing document
- Retroactive billing
- Process billing due list
- Set billing date
- Display billing documents from the archive
- List of billing documents
- Rebook accounting indicator
- Release sales orders for billing
- Display sales and distribution documents blocked for billing

Integration

The role [Rebate Processing \[Page 12\]](#) contains all the functions for processing rebate settlements.

Billing Processing (In The Background)**Billing Processing (In The Background)**

SAP_LO_SD_BILLING_BATCH_PROCESSING

Tasks

This role contains all the functions for executing billing processing in the background. This includes, alongside displaying a billing document, generating batch jobs for billing and displaying information about which billing documents have already been generated from the billing due list.



With the report RSNAST00, you can send messages (for example, invoices, invoice lists) at a later date, using background processing. This report is not made available in the context of this role.

Activities in Sales and Distribution Processing (SD)

- Display billing document
- Generate batch jobs for billing
- Generate log for billing document run

Invoice List Processing

SAP_LO_SD_INVOICELIST_PROCESSI

Tasks

This role contains all the activities for working with invoice lists which you need for processing invoices.

Invoice lists make it possible to send a list which contains several billing documents (invoices, credit and debit memos) to a payer at specific time intervals or on specific days. These lists can be generated in background processing.

Single documents or collective documents can be included in the billing documents in the invoice list (collective invoices contain items from more than one delivery).

There are two types of invoice lists in the Standard:

- one for invoices and debit memos
- one for credit memos

Activities in Sales and Distribution Processing (SD)

- Create/change/display invoice lists
- Process worklist for invoice lists
- Generate invoice list
- Generate cancellation invoice list
- Display invoice list from the archive

Integration

[Billing Processing \[Page 15\]](#)

Maintain Customer and Material Information**Maintain Customer and Material Information**

SAP_LO_SD_INFORMATION_PROCESSING

Tasks

This role contains all the functions which you need in order to maintain customer-specific information and material information on the customer.

This includes master data maintenance of the material and the customer, maintenance of customer hierarchy, maintenance of customer-specific data on a material, of proposal lists (item proposal) for sales document entry, of substitution materials and maintenance of value contracts.

Activities in Sales and Distribution Processing (SD)

- Maintain material listing/exclusion
- Reference material listing/exclusion
- Maintain material substitution
- Reference material substitution
- Maintain material information
- Select customer material information according to material or customer
- Maintain material
- Maintain customer (Sales)
- Maintain customer hierarchy
- Maintain materials for cross selling
- Maintain value contracts
- Maintain Incoterms

Display Pricing

SAP_LO_SD_PRICING_DISPLAY

Tasks

This role groups together functions which you need for displaying pricing data for a material. This displays pricing conditions, lists for conditions, and displays how free goods are created by the system.

Activities in Sales and Distribution Processing (SD)

- Display condition records
- Display condition lists
- Display conditions using index
- Display free goods determination

Maintain Pricing

Maintain Pricing

SAP_LO_SD_PRICING_MAINTAIN

Tasks

This role contains functions for defining pricing, on the basis of which the prices and costs are calculated. The basis for pricing is the maintenance of conditions, with the help of which conditions can be defined, which should be a basis for calculating a price. This also includes the maintenance of conditions, when a free good (exclusive bonus quantity or inclusive bonus quantity) should be granted.

Activities in Sales and Distribution Processing (SD)

- Create/change/display condition
- Condition processing using index
- Create/change/display free good
- Create/change/display condition lists
- Process net price list
- Release expected customer price

Integration

In Customizing for Sales and Distribution, you define how the system creates the prices from the information stored in the condition records. The role [Customizing Project Employees \[Ext.\]](#) (SAP_BC_CUS_CUSTOMIZER) is available to you for functions in Customizing.

The role [Sales Deal and Promotion Processing \[Page 13\]](#) (SAP_LO_SD_PRICING_MAINTAIN) is available to you for processing sales deals and promotions.

Release Blocked Documents for Billing

SAP_LO_SD_BLOCKED_BILLING_DOC

Tasks

This role groups together activities for releasing sales documents, which are blocked for billing. You can display which sales documents are blocked for billing, and change them. You can release individual sales documents or several sales documents for billing at the same time, and change billing documents (invoices, credit memos, debit memos).

Activities in Sales and Distribution Processing (SD)

- Release sales orders for billing
- Change billing document
- List of blocked billing documents

Integration

[Billing Processing \[Page 15\]](#)

[Invoice List Processing \[Page 17\]](#)

Release Sales Orders for Delivery**Release Sales Orders for Delivery**

SAP_LO_SD_RELEASE_FOR_DELIVERY

Tasks

This role contains all the functions you need for releasing sales orders, which are blocked for the delivery.

Activities in Sales and Distribution Processing (SD)

- Change sales order
- Block and unblock customer from sales view
- Generate lists for incomplete sales documents and for sales documents blocked for delivery

Display Sales Information

SAP_LO_SD_SALES_DISPLAY

Tasks

This role groups together functions for displaying sales information. This includes the display of sales documents, of different lists for sales documents and item proposals, of material exclusion and material listing.

Activities in Sales and Distribution Processing (SD)

- Generate list for quotations, contracts, sales orders or scheduling agreements
- Generate list for incomplete quotations, contracts, sales orders or scheduling agreements
- Generate list of sales orders blocked for delivery
- Display sales activities, item proposals, material listing and material exclusion
- Sales support monitor

Display Billing Documents**Display Billing Documents**

SAP_LO_SD_BILLING_DISPLAY

Tasks

This role contains functions for displaying billing documents (invoices, credit memos, debit memos).

Activities in Sales and Distribution Processing (SD)

- Display billing document
- Display list of billing documents
- Display blocked billing documents

Sales Analysis

SAP_LO_SD_SALES_PERFORMANCE

Tasks

In this role, activities are grouped together for analysis and Controlling in Sales. This contains, for example, diverse evaluations, such as the list of the top customers or materials, flexible planning, customer information, such as sales summary, lists of inquiries, backlogged sales orders, overdue contracts or rebate agreements.

Activities in Sales and Distribution Processing (SD)

- Contracts: Lists for overdue and completed contracts
- Quotations: Lists for overdue and completed quotations
- Backorder processing: Backlog list, selection list
- Generate list for: Inquiries, rebate agreements, scheduling agreements
- Information on the customer: Sales summary, list of top customer
- Material information: List of top materials
- Sales support monitor
- Flexible planning: Display/create/change

Credit Management in Sales and Distribution Documents

Credit Management in Sales and Distribution Documents

SAP_LO_SD_CREDIT_MANAGEMENT

Tasks

This role groups together all the functions which are available to you in *Sales and Distribution Processing* for the credit manager. This includes releasing sales and distribution documents which are blocked for credit reasons, credit authorization, diverse list functions for sales and distribution documents, deliveries and billing documents.

Activities in Sales and Distribution Processing (SD)

- Process credit authorization for sales and distribution documents
- List of released sales and distribution documents
- List of blocked sales and distribution documents
- Process credit authorization according to sales and distribution document
- Process credit authorization according to delivery
- List of incomplete sales and distribution documents
- Sales and distribution documents blocked for delivery
- Delivery monitor
- List of billing documents

Integration

The role of the credit manager also includes, alongside activities in sales and distribution processing (SD), activities in Financial Accounting (FI), such as, for example, master data maintenance and different list and control functions.

You can find further activities in the context of credit management in the following roles:

- [Display Credit Data \[Ext.\]](#) (SAP_FI_AR_DISPLAY_CREDIT_INFO)
- [Credit Management Master Data \[Ext.\]](#) (SAP_FI_AR_CREDIT_MASTER_DATA)

Backorder Processing

SAP_LO_SD_BACKORDERS

Tasks

This role groups together activities for processing backlogged sales orders, and their rescheduling.

This includes listing sales documents relevant for requirements for specific materials, and processing the confirmation manually. This means that missing parts can be cleared, if ATP quantities are assigned, or quantities already confirmed are cancelled, or assigned as new. As an alternative to backorder processing with a selection list according to sales documents, it is also possible to select and process backlogged sales orders for an individual material.

Activities in Sales and Distribution Processing (SD)

- Display backlogged sales orders
- Process backorder processing using selection list according to sales documents
- Backorder processing: access using the material
- Execute rescheduling of sales documents
- Evaluate rescheduling of sales documents

Sales Support**Sales Support**

SAP_LO_SD_SALES_SUPPORT

Tasks

This role groups together functions which are needed for processing pre-sales activities. This includes functions for supporting Sales and Distribution using pre-sales data, processing and maintaining data about contact persons and interested parties, functions for executing mailing promotions, evaluating data on competitors and their products, and different functions for displaying information about the customer.

Activities in Sales and Distribution Processing (SD)

- Create/change/display sales activities
- Executing mailing promotions
- Display and create interested parties and contact persons
- Display sales summary
- Sales support monitor
- Display competitive products

Output Processing

SAP_LO_SD_OUTPUT_PROCESS

Tasks

This role contains activities which you need for sending information (for example, sales order confirmation) in the Sales area.

Activities in Sales and Distribution Processing (SD)

- Display/change/create output-condition records in Sales