Assign Sales Documents and Delivery Documents in SAP

In this SAP SD Tutorial you will learn how assign sales documents and delivery documents in SAP using navigation menu path and transaction code OVAK & OVAD.

Purpose of Configuration

After defining credit groups in SAP, you need to assign sales documents and delivery documents to a particular credit groups for checking the customer credit limits.
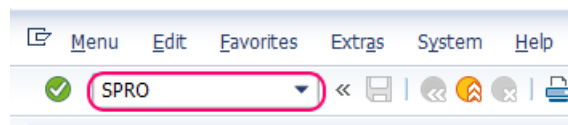
How to Assign Sales Documents and Delivery documents in SAP?

The link between sales document type and credit group is established through through the assignment of sales document to credit group, link between delivery documents and credit group is established through assigning delivery documents to credit groups in SAP.
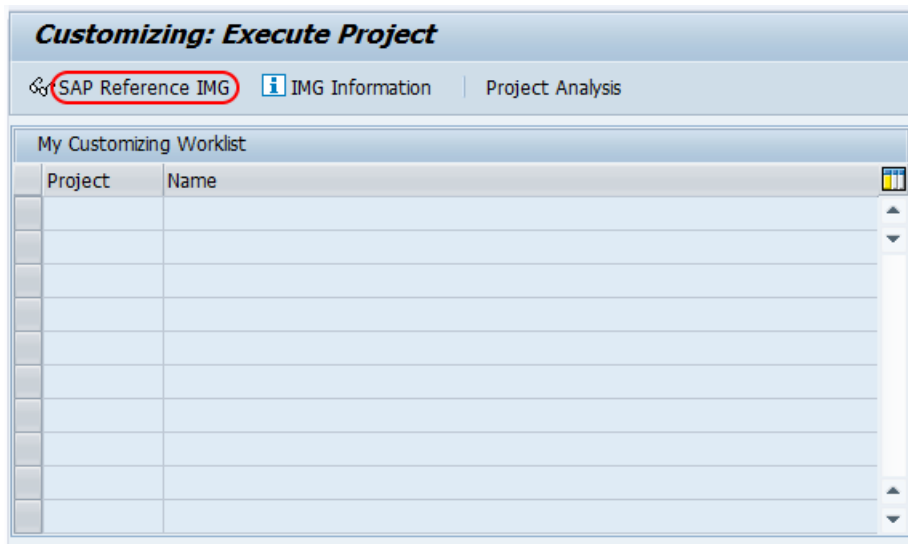
Navigation

| SAP R/3 Role Menu	Assign sales documents & Delivery documents
Transaction Code	OVAK, OVAD
SAP IMG Path	SPRO => IMG => Sales and distribution => Basic functions => Credit management and risk management => Credit management =>Assign sales documents and delivery documents => Credit limit check for order types/delivery types.

Step 1 : – Execute Tcode "SPRO" from SAP easy access screen.
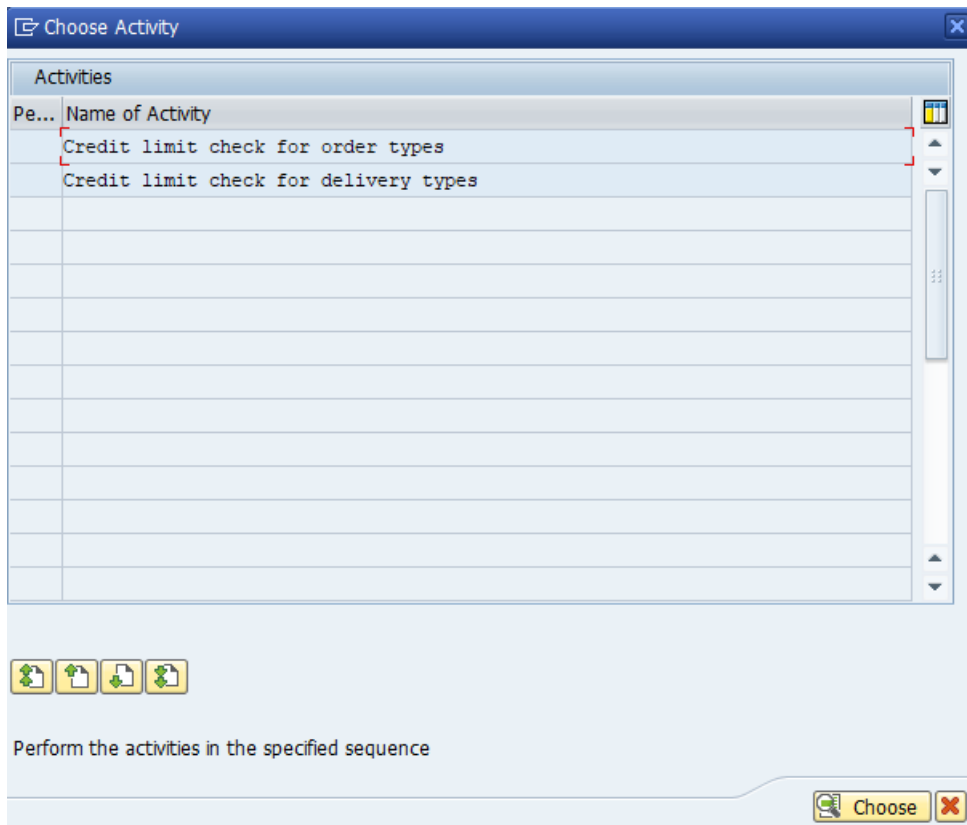

Step 2 : – Choose display SAP reference IMG (F5).

Step 3 : – From display IMG screen, follow the navigation menu path and choose img activity SD -Basic functions -credit management and "Assign sales documents and delivery documents.
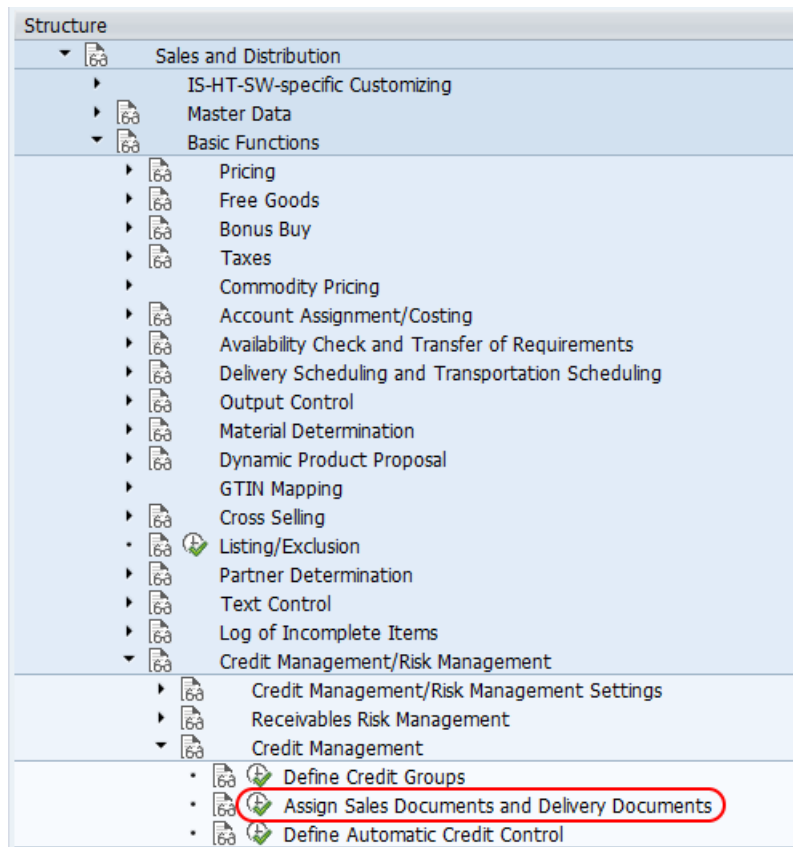
**Step 4 : –** A choose activity dialog box appears with the activities

- Credit limit check for order types
- Credit limit check for delivery types.

Assign Sales Documents

Step 5: – Double click on credit limit check for order types for assigning a credit group to the sales document type which is sales order type.

On change view sales document types – credit limit check overview screen, select the required sales document types and assign credit group key T1.
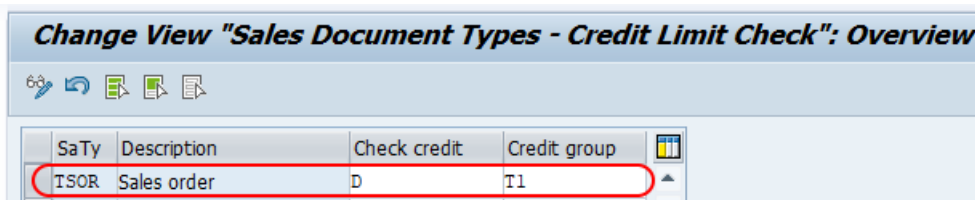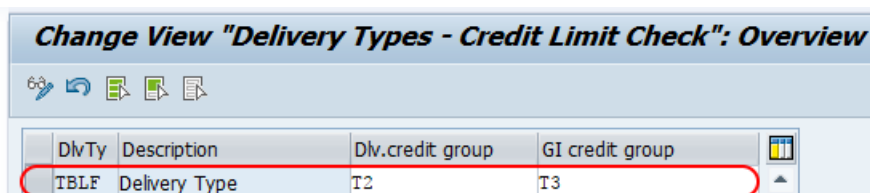

Click on save button to save the details.

Assign Delivery Documents

Press F3 or click on back option, from choose activity screen, double click on credit limit check for delivery types.

Select the required delivery type and assign the corresponding credit groups respectively to block the delivery and goods issue.

After assigning document types for credit limit check, click on save button and save the configured assignment details in SAP Systems.

⊦ SAP SD - Maintain access sequences

⊦ SAP SD - Maintain condition types

⊦ SAP SD - Maintain pricing procedure

⊦ SAP SD - Define pricing procedure determination

SAP SD Sales Documents

⊦ SAP SD - Define order reasons

⊦ SAP SD - Define purchase order types

⊦ SAP SD - Define item categories

⊦ SAP SD - Assign item categories

⊦ SAP SD - Define item category groups

⊦ SAP SD - Define schedule line categories

⊦ SAP SD - Assign schedule line categories

⊦ SAP SD - Define sales document type

SAP SD - Billing process

SAP SD - Credit and Risk Management

⊦ SAP SD - Maintain credit control area

⊦ SAP SD - Assign credit control area to company code

⊦ SAP SD - Define risk categories

⊦ SAP SD - Define credit groups

⊦ SAP SD - Assign sales documents & delivery documents

⊦ SAP SD - Credit limit for customers

SAP SD - Reports and Analysis

SAP TCodes

⊦ SAP TCodes

⊦ SAP SD TCodes