Business Partner Master Data (LO-MD-BP)

HELP.LOBP

Release 4.6C

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Business Partner Master Data (LO-MD-BP)

Purpose

The following types of business partner are defined in the R/3 System:

- Partner type customer

  A customer is a business partner with whom you exchange goods and services. Two types of customer are defined in the R/3 System:

  – Internal customers (own sites)

  – External customers

- Partner type vendor

  A vendor is a business partner from whom goods and services can be procured. Two types of vendor are defined in the R/3 System:

  – Internal vendors

    Normally you only maintain distribution centers as internal vendors.

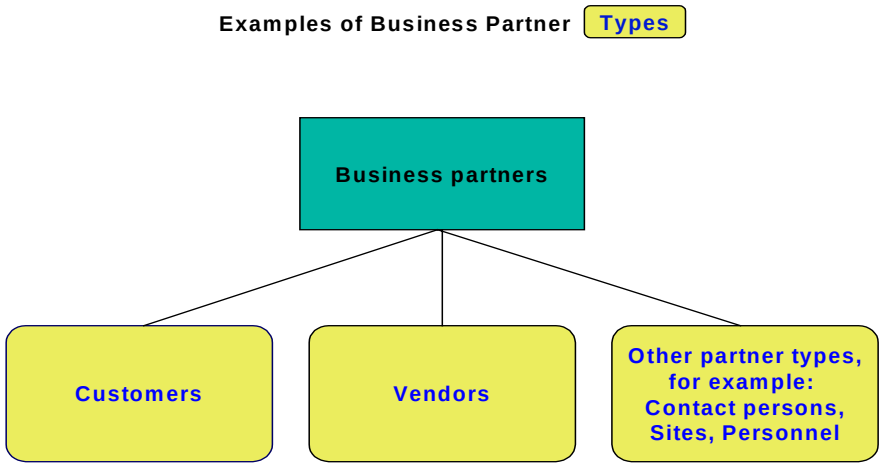
  – External vendors

    You select external vendors from companies offering an assortment of goods and services on the market, with the help of guidelines drawn up by your Purchasing department.

- Other partner types

  A contact person [Page 18] is an example of another business partner in the R/3 System.

Business Partner Master Data (LO-MD-BP)



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Data on business partners is stored in master records. The system uses this data in a number of business transactions, proposing the data in the appropriate fields when, for example, you create sales or purchase orders.

Implementation Considerations

Storing the master records centrally and making master data the only source of information for all system functions means that you enter data only once. If a business partner changes address, you enter the new address once.

Integration

Because customers are also debit-side business partners in accounting, customer master records are used in Financial Accounting and Sales and Distribution.

Because vendors are also credit-side business partners in accounting, vendor master records are used in Financial Accounting and Purchasing.

Because sites are customers from the point of view of delivery, each site has a customer master record. Sites use purchase orders to order goods from external vendors. A distribution center is a site that is also an internal vendor, as it supplies merchandise to other sites.

Additional Information

For additional information on business partners, see the following sections of the SAP library:

- FI Accounts Receivable and Accounts Payable [Ext.]

- SD Basic Functions and Master Data in Sales and Distribution [Ext.]
- MM Purchasing [Ext.]
- Retail:
  - Business Partner Master Data [Ext.]
  - Site [Ext.]
- Cross Application
  - CA Mass Maintenance [Ext.]

Business Partners

Definition

Business partners are legal or natural persons with whom you have a business relationship.

Customers and vendors are business partners with whom you have a relationship involving the transfer of goods and services.

Use

Business partners have a number of different functions, described as partner functions, in connection with your company. You use partner functions to define the rights and responsibilities of each partner type in a business transaction. When you sell or order goods, for example, your business partners can assume partner functions such as:

Customer Partner Functions	Vendor Partner Functions
Sold-to party	Ordering address
Ship-to party	Goods supplier
Bill-to party	Invoice presented by
Payer	Alternative payee

Different business partners may carry out one or more partner functions. For this reason, you can assign individual business partners a number of partner functions.

You manage data on business partners in master records. Data on partner functions is stored in these master records and used in Financial Accounting and Logistics.

Integration

A business partner can be a customer and a vendor at the same time if, for example, your customer also supplies goods to you or if a vendor is also one of your customers. In this case, you must create a customer master record and a vendor master record for the business partner. You can create a link between the two master records by entering the vendor number in the customer master record and the customer number in the vendor master record.

Business Partner Master Data Structure

Use

You enter data on business partners with whom your company has a business relationship in master records. Master records contain all data necessary for processing business transactions. This is known as master data.

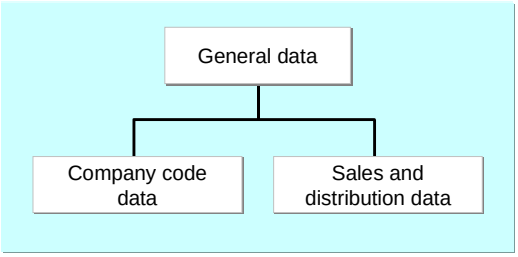
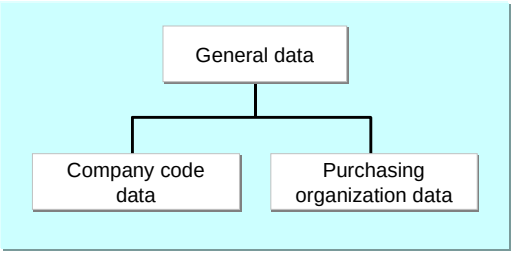
If you enter all master data, you spend less time processing business transactions because the system proposes the master data in these transactions.

Financial Accounting and Logistics use master data. General data and data relevant to both departments is stored in shared master records to avoid duplication.

Features

You can create and change master records using groups of data that differ in the level of detail.

Master records for business partners who are customers or vendors have the following structures:

Customer Master Records	Vendor Master Records
	

- General Data

  General data does not depend on the company code, the sales and distribution organization or the purchasing organization. General data applies to one business partner for all company codes, and in all sales areas and purchasing organizations. It includes:

  – Company name

  – Address

  – Telephone number

  General data is not limited to information used by both Financial Accounting and Logistics. The unloading point, for example, is unique for a customer and is only relevant for Sales and Distribution. However, because it is not part of the sales and distribution organization of your company, it is not sales and distribution data. It is general data.

If you edit a master record using the customer or vendor number without specifying a sales area, a purchasing organization, or a company code, the system displays only general data screens.

The department that creates the master record for a business partner also enters general data. If Financial Accounting creates the master record, it must also enter general data, such as the address. When Logistics then enters data, the general data for the business partner exists. Logistics can display the general data.

- Company Code Data

  Company code data only applies to one company code. This data is only relevant to Financial Accounting, and includes:

  – Account management data

  – Insurance data

  If you edit a master record, you must specify the customer or vendor number and company code to access the screens containing company code data.

  You can only invoice a business transaction if the data on the payer partner function is entered in the Financial Accounting view.

- Sales and Distribution Data

  The data for one customer can differ for each sales area. The sales area is a combination of sales organization, distribution channel and division. This data is only relevant to Sales and Distribution, and includes:

  – Pricing data

  – Delivery priority

  – Shipping conditions

  If you edit a customer master record, you must enter the customer number and the sales area in order to access screens containing sales and distribution data.

  You can only process sales and distribution transactions, for example, a sales order, after entering the sales and distribution data for a customer.

- Purchasing organization data

  The data for one vendor can differ for each purchasing organization. This data is only relevant to Purchasing, and includes:

  – Purchasing data

  – Partner functions

  – Other data retention levels within the purchasing organization

    In addition to data that is valid for the whole purchasing organization, you can enter information on the *Purchasing data* and *Partner functions* screens that is only valid for a particular site or vendor sub-range. This includes terms of payment or incoterms that differ from those valid for the purchasing organization. Such data is retained at the following levels:

    - Vendor sub-range
    - Site

- A particular combination of vendor sub-range and site

You negotiate better prices and conditions for a particular vendor sub-range than those valid for the purchasing organization. You create a vendor sub-range and maintain the different terms of payment for it.

Account Groups

Use

When you create a master record for a business partner, you must enter an account group. The account group determines:

- Which screens and fields are necessary for entering master data
- Whether you can or must make an entry in these fields
- How master record numbers are assigned (externally by you or internally by the system) and the number range from which they are assigned
- Which partner functions are valid
- Whether the business partner is a one-time customer or one-time vendor

Additionally, for vendor master records only, the account group determines:

- Whether default purchasing data [Ext.] in the vendor master is to be transferred to article master records and purchasing information records
- Whether there are any other data retention levels [Ext.] below the purchasing organization level (for example, site or vendor sub-range level) at which data can be retained in the vendor master, and if so, what these are

In the standard R/3 System, if you create a master record for the partner function ship-to party, for example, the system proposes an account group. You can also use account groups to define all other partner function combinations (for example, if the ship-to party is also the payer for the goods).

Prerequisites

In Customizing, you define account groups available in the following activities:

- *Logistics Basic Data: Business Partners*
  - Define Account Groups and Field Selection for Customers [Ext.]
  - Define Account Groups and Field Selection for Vendors [Ext.]
- *Accounts Receivable and Accounts Payable (Financial Accounting)*
  - Define Account Groups with Screen Layout (Customers) [Ext.]
  - Define Account Groups with Screen Layout (Vendors) [Ext.]

Additional Information

Changing an Account Group [Ext.]

Number Assignment

Use

A unique number is assigned to each business partner master record. You can use this number to access the master record, or to refer to the business partner when processing business transactions.

Features

The number for a business partner master record can be assigned in one of the following ways:

- Externally

  You assign the number. In this case, you define a number range that allows for alphanumerical number assignment. The system checks whether the number you enter is unique and within the number range defined by the account group.

- Internally

  The system assigns a consecutive number automatically from a number range defined by the account group.

The account group determines whether external or internal number assignment is allowed for a business partner master record. For account groups 0001 to 0005, for example, only internal number assignment is allowed in the standard R/3 System.

Number Range

A number range can be valid for more than one account group.

You can use the number range to assign different numbers to a head office and subsidiaries.

In the standard R/3 System, the account groups for the following customer partner functions are in the same number range so the numbers for these customer master records are assigned consecutively:

- Sold-to party
- Ship-to party
- Bill-to party
- Payer

Integration

A customer's number is unique for all sales areas and company codes. A vendor's number is unique for all purchasing organizations and company codes.

You first create a master record for your business partner in one sales area. You then create a second master record for the same business partner in another sales area. In this case, the system identifies the business partner number and does not

display the existing general data from the first master record for maintenance. You can use the change and display functions to access the general data.

Prerequisites

In Customizing you define the number ranges that are to be available. You do this in the following activities:

- *Logistics Basic Data: Business Partners*
  - Define and Assign Customer Number Ranges [Ext.]
  - Define Number Ranges for Vendor Master Records [Ext.]
- *Accounts Receivable and Accounts Payable*
  - Create Number Ranges for Customer Accounts [Ext.]
  - Assign Number Ranges to Customer Account Groups [Ext.]
  - Create Number Ranges for Vendor Accounts [Ext.]
  - Assign Number Ranges to Vendor Account Groups [Ext.]

Partner Functions

Use

Use partner functions to define the rights and responsibilities of each business partner in a business transaction. You assign partner functions when you create a master record for a business partner.

Features

The following are examples of partner functions that are defined in the standard R/3 System:

- Partner functions for partner type customer
  - Sold-to Party [Ext.]

    Contains data on sales, such as the assignment to a sales office or a valid price list
  - Ship-to Party [Ext.]

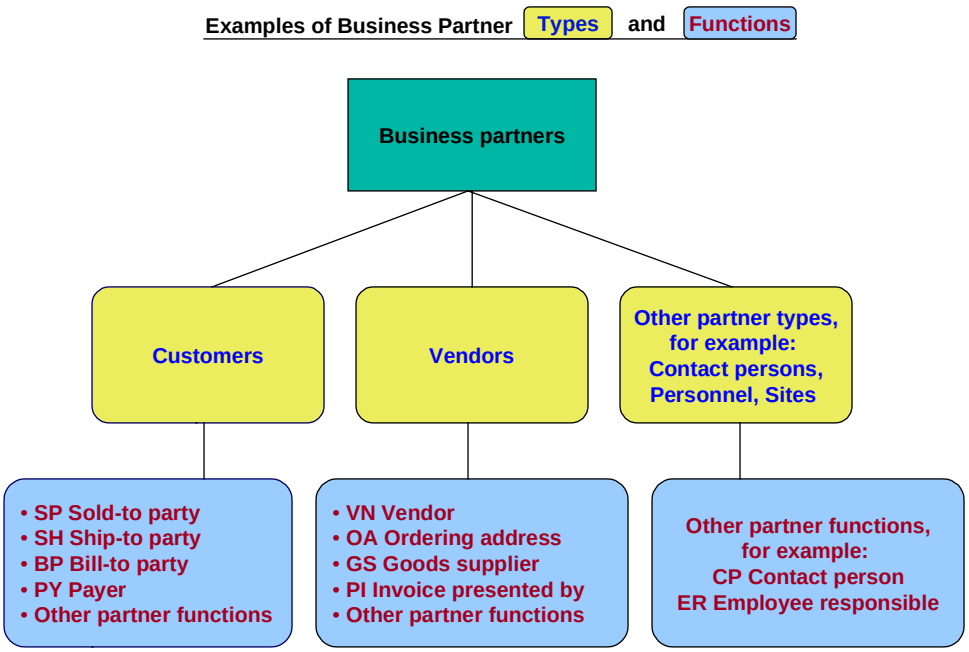
    Contains data for shipping, such as unloading point and goods receiving hours
  - Bill-to Party [Ext.]

    Contains the address and data on document printing and electronic communication
  - Payer [Ext.]

    Contains data on billing schedules and bank details
- Partner functions for partner type vendor
  - Ordering address
  - Invoice presented by
  - Goods supplier
  - Alternative payee
- Partner functions for other partner types, for example, personnel (HR master records)

  Employee responsible

  You can use this partner function, for example, to assign a buyer within your company to a vendor.



Activities

Customer partner functions

The company or person who places an order can be the same company or person who receives the goods and the invoice and pays. Because this customer assumes all partner functions, you create one master record for the customer. You create a customer master record for the sold-to party in which you enter data required for the other partner functions.

A subsidiary office can place an order and its head office can pay the invoice. In this case, you divide partner functions among the different offices. You need a corresponding number of customer master records. In one master record you enter, for example, the address of the sold-to party for correspondence, in the other, the address of the ship-to party for delivery. You establish a link between the partner functions in the customer master record of the sold-to party by entering the customer number of the respective partner functions.

Prerequisites

When creating master records, you define the partner functions for business partners by assigning an account group. For partner types customer and vendor, you define which account group can be used for which partner function. You do this in Customizing in the following activities:

- Customer

In Customizing for *Basic Functions (SD)* in the activity Assign partner functions on the debit side to account groups [Ext.].

- Vendor

  In Customizing for *Purchasing* (*MM*) in the activity Define permissible partner roles per account group [Ext.].

The partner determination procedure specifies the partner functions that are allowed or mandatory for processing a particular business transaction, such as a sales or purchase order.

Additional Information

Partner Determination in Sales and Distribution [Ext.]

Vendors: Partner Determination [Ext.]

Contact Persons

Use

Contact persons are people in a business partner company with whom you are in contact by telephone, mail, or in person to perform business transactions. You store detailed information on contact persons in master records for business partners.

Features

The information you need about contact persons is not the same as the information you need about a business partner company. Important data includes:

- Name
- Telephone number
- Department

Activities

Because the contact person is part of the business partner company, you enter contact person data in the respective customer or vendor master record. You do not need a separate master record for contact persons. You assign a new number to each contact person in a master record. You can enter as many contact persons as desired for each business partner.

In the standard R/3 System, you can only enter the data on a contact person in the customer master record of the sold-to party because the system only proposes contact persons from this master record in the sales order.

Contact persons in the vendor master can be used in their partner role (partner function CP) at various data retention levels with the data available for associated functions in Logistics and Financial Accounting.

Consumers

Use

A consumer is a natural, private business partner with whom you have a relationship involving the transfer of goods and services. You create customer master records for business partners who are consumers.

Features

Reference Customer

To create consumer master data and to process sales, you require reference data known as the reference customer. You can create a maximum of one reference customer per client. When you create the reference customer, you must enter company code data and sales area data. Company code data and sales area data is used with master records for consumers as follows:

- Company code data

  When you create a master record for a consumer, the company code data for the consumer is copied from the reference customer. Once the master record is created, you can maintain the data for this company code and additional company codes.

- Sales area data
  - Sales area data is not maintained for a consumer.

    You create a master record for a consumer and you do not enter sales area data. During operative business transactions, for example, when you create an order for a consumer, the sales area data is copied from the reference customer.
  - Sales area data is maintained for a consumer.

    You create a master record for a consumer and you enter sales area data. During operative business transactions, this sales area data is used by the system.

    A consumer cannot be a reference customer.

Maintenance of Consumer Master Data

You have the following options for maintaining consumer master data:

- You can maintain the minimum number of fields for consumer master data maintenance on a tab [Ext.].
- You can maintain all fields for consumer master data maintenance on an extended tab with additional tab pages.

When you maintain consumer master data, you can switch between these options without leaving the transaction. As for customer master data maintenance, standard tabs appear as defaults or you can create your own tab layouts for both consumer master data maintenance options.

Consumers

Prerequisites

In customizing for *Business Partners*, you can create your own tab layouts for consumer master data maintenance. You do this in the activity *Create Tab Layouts for Consumers*.

Activities

Processing Operative Business Transactions

- Document Entry

  You have not maintained sales area data for a consumer. During document entry, the sales area data is copied from the master data of the reference customer.

- Partner Determination

  When you create an order, for example, partner functions are determined as follows:

  – You have not maintained sales area data for a consumer.

    The following partner functions are automatically assigned to the consumer who is ordering:

    - Sold-to party
    - Payer
    - Bill-to party
    - Ship-to party

      The reference customer is used to determine other partner functions, for example:

    - Forwarding agent
    - Employee responsible

  – You have maintained sales area data for a consumer.

    All partner functions are determined from the master record for the consumer.

- Output

  You have to set output determination for consumer master data processing using the condition technique (that is, the print proposal does not originate in the customer master data).

Additional Information

Creating and Changing Business Partner Master Data [Page 24]

Partner Determination in Sales and Distribution (SD-BF-PD) [Ext.]

One-Time Customers and One-Time Vendors

Use

Your company does business with some business partners for a long time. For example, you have special price agreements with long-term customers and their deliveries get preferential treatment. At the end of the fiscal year, you can honor the loyalty of these customers with rebate payments. In other cases, you have only one contact with a business partner. For example, you order merchandise from a different vendor once, because your preferred vendor cannot deliver. In the R/3 System you can distinguish between:

- Customers and vendors

  You create a master record and assign partner functions for each business partner.

- One-time customers and one-time vendors

  Business partners who have a business transaction with you only once are called one-time customers and one-time vendors. You do not have to create a master record for one-time customers or one-time vendors because you do not need this master record after the business transaction, and it uses space. You create collective master records for one-time customers and one-time vendors.

  You create a collective master record for a dummy customer that only includes data for all customers in a certain region. This collective master record can include the following fields:

  - Master record name
  - Language
  - Currency
  - Sales office processing the data

  If a one-time customer from this region orders goods from your company, use the customer number of the collective master record when processing the sales order. You enter the address and other data that is not in the collective master record in the sales order.

Prerequisites

The account group can restrict the number of screens accessed in the collective master record for one-time customers and one-time vendors. If only some of the screens and fields for one-time customers and one-time vendors are relevant for your company, change the account group CPD or set up a new account group. You do this in the Customizing activities listed in the section on account groups [Page 12].

Activities

When you create a collective master record, the system proposes the account group CPD. This ensures that you can access screens from different partner functions relevant for one-time customers and one-time vendors. The system only displays fields that can be identical for all one-time customers and one-time vendors. For example, all address fields are suppressed

because the master record is collective for data on several business partners who can have different addresses.

Common Sales and Distribution Master Data

Use

You can define that customer master records, which have been created for each sales organization for a distribution channel (or division), are also valid in other distribution channels (or divisions). As a result, you create and change customer master records that are required in different distribution channels or in different divisions only once. This makes it easier to create and change master records.

You can also use the same function to process article master data and prices.

Activities

In the standard R/3 System, you can define common master data for the following:

- Distribution channels

  In Customizing, you can specify other distribution channels in which the customer master data (and article master data and prices) from the reference distribution channel are also valid.

- Divisions

  In Customizing, you can specify other divisions in which customer master data (and article master data and prices) from the reference division are also valid.

Prerequisites

You do this in Customizing for *Master Data* (*Sales and Distribution*) in the following activities:

- Define Common Distribution Channels [Ext.]
- Define Common Divisions [Ext.]

Example

Customer master record has been created	Sales organization	Distribution channel	Customizing: Data is also valid for these distribution channels
Yes	0001	01	02
No	0001	02	

You create a customer master record for the sales organization 0001 and distribution channel 01. In Customizing, you specify that this customer master data is valid for the distribution channel 02. When you process a sales order for a customer in the sales organization 0001 and distribution channel 02, the system uses the customer master data entered for distribution channel 01.

Creating and Changing Business Partner Master Data

Use

Business partner master data from Financial Accounting and Logistics is stored in shared master records that can be accessed from both views. This function lets you create and change master records for business partners centrally, that is, including the following data:

- Customer master records and vendor master records
  - General data

    General data is independent of company code, sales area, and purchasing organization and is therefore valid for business partners for all company codes, all sales areas, and all purchasing organizations.
  - Company code [Ext.] data

    The company code data is defined separately for individual company codes. You can only bill for a transaction if the payer has been maintained from a Financial Accounting view (company code data).
- Customer master records only
  - Sales area [Ext.] data
- Vendor master records only
  - Purchasing organization [Ext.] data

Features

Reference Master Records

If you create a new master record, and a master record with similar data exists, you can use the existing master record as a reference. You enter the number of the existing business partner in the *Customer* or *Vendor* field in the reference section of Create Customer: Initial Screen [Ext.] or Create Vendor: Initial Screen [Ext.]. The system copies data from the existing reference master record to the new master record.

If you only enter the customer or vendor number in the reference section, the system copies the general data only. If you also enter the company code, sales area or purchasing organization in the reference section, the corresponding data is also copied. Only data that can be identical for both master records is copied. For example, country, language and account group are copied. The address is not copied. You can change copied data.

Search Help

You can use matchcodes to search for vendor, customer, and consumer master records. An additional search help lets you search using address attributes such as:

- Name
- Street
- Zip code

If you enter any character (including *) in the search help field *First name* when searching for customer master records, only those for consumers are found. This is because you can only maintain first names for customers who are consumers and not for companies.

Customer master record search criteria**:**

Name	Smith
First name	Thomas

In the search help field *Name,* you enter Smith. In the search help field *First name,* you enter Thomas. The consumer master record Thomas Smith is located, and not the customer master record for the company Thomas Smith (Ltd.).

Prerequisites

In customizing for *Business Partners*, you can create your own tab [Ext.] layouts for customer and consumer master data maintenance. You do this in the activities under *Create Tab Layouts*.

Activities

Creating Business Partner Master Records

1. Assign an account group and specify the partner function the business partner is to fulfill (for example, sold-to party or one-time vendor).
2. Enter the business partner number or the system assigns the number.
3. If a master record with similar data already exists that you want to use as a reference, search for and enter data on the existing master record in the reference section.
4. Enter and save the following data in the master record as appropriate:
    - General data (for example, address, payment cards, receiving points and departments)
    - Company code data (for example, account management data)
    - Sales area data (for example, sales, shipping, and billing data)
    - Purchasing organization data (for example, partner functions)

Changing Business Partner Master Records

1. Enter the business partner number or search for the business partner master record you want to change.
2. Change and save the master data as appropriate.

Additional Information

FI Accounts Receivable and Accounts Payable:

Creating a Customer Master Record Centrally [Ext.]

Creating and Changing Business Partner Master Data

Changing a Customer Master Record Centrally [Ext.]

Creating a Vendor Master Record Centrally [Ext.]

Changing a Vendor Master Record Centrally [Ext.]

SD Basic Functions and Master Data in Sales and Distribution:

Creating a Customer Master Record [Ext.]

Processing a Customer Master Record [Ext.]

MM Purchasing:

Maintaining Vendor Master Records [Ext.]

Retail:

Customers: Creating a Customer (Sold-To Party) Master Record [Ext.]

Vendors: Creating a Vendor Master Record [Ext.]

Site Processing [Ext.]

Blocking Activities with Business Partners

Use

There can be many reasons for blocking certain activities with business partners, for example:

- Your business partner has outstanding debts or goes into liquidation
- You want to stop all deliveries to or from a business partner
- Your business partner fails to reach agreement with you on conditions
- Your business partner repeatedly issues incorrect invoices

Features

To block activities with business partners you can use different blocks, such as:

- Payment block

  Prevents all payments, for example, prevents payment of credit memos and rebates to a customer because of outstanding debts. You define blocking keys to specify the blocking reason and the desired reaction of the system to the block.

  For information on how to proceed, see Setting a Payment Block [Page 29].

- Posting block

  Prevents all postings to the customer or vendor account, for example, before you flag a master record for deletion.

  For information on how to proceed, see Setting a Posting, Sales and Distribution, or Purchasing Block. [Page 30]

- Sales and distribution blocks

  You define blocking keys to specify the blocking reason and the desired reaction of the system to the block. There are three types of sales and distribution block:

  – Order block

    Prevents order type “credit memo request”

  – Delivery block

    Stops all deliveries to a customer

  – Billing block

    Prevents billing documents being created with incomplete prices

  For information on how to proceed, see Setting a Posting, Sales and Distribution, or Purchasing Block. [Page 30]

- Purchasing block

  Blocks purchase orders placed with the vendor, purchase requisitions involving the vendor, and allocation tables that involve purchase orders being placed with the vendor

  For information on how to proceed, see the following:

  - Setting a Posting, Sales and Distribution, or Purchasing Block [Page 30]
  - Setting a Purchasing Block for Sites and Vendor Sub-Ranges [Page 32]
- Block for quality reasons

  For information on how to proceed, see Setting a Block for Quality Reasons [Page 33].

Prerequisites

Payment blocks only affect manual payments if the blocking key has been assigned the corresponding attribute in Customizing for *Outgoing Payments* (Financial Accounting) in the activity Check Payment Block Reason [Ext.].

Activities

You can set blocks at different organizational levels as follows:

- Posting blocks and payment blocks for the whole client or for one or more company codes
- Sales and distribution blocks for the whole client or for one or more sales areas
- Purchasing blocks and blocks for quality reasons for the whole client or for one or more of the following:
  - Purchasing organizations
  - Vendor sub-ranges
  - Specific sites

Additional Information

FI Accounts Receivable and Accounts Payable:

Blocking a Customer Account Centrally [Ext.]

Blocking a Vendor Account Centrally [Ext.]

Retail:

Site Block [Ext.]

Setting a Payment Block

1. On the Change Customer: Initial Screen [Ext.] or the Change Vendor: Initial Screen [Ext.] enter the customer or vendor number and the company code for which the block is valid.

   – For blocking payments to customers, proceed as follows:

     Choose *Enter*. The *Change Customer: General Data* tab appears.

     Choose *Company code data.* The *Change Customer: Company Code Data* tab appears.

     Choose the tab page *Payment transactions.*

   – For blocking payments to vendors, proceed as follows:

     Select the *Payment transactions* view in the *Company code data* section of the screen and choose *Enter*.

     The *Change Vendor: Payment Transactions Accounting* screen appears.

2. Set the blocking key in the *Payment block* field in the *Automatic payment transactions* field group.
3. Save. The payment block for one company code is effective as soon as it is set.
4. If you have assigned a business partner to more than one company code, repeat steps one to three to block the business partner for individual company codes.

   To delete a payment block, follow the same procedure.

   If you set a payment block to stop a vendor from being paid, you can still post to the vendor account (for example, at goods receipt).

   If you set a posting block for a vendor, this also prevents you from paying any open items for the vendor. In this case, the posting block also acts as a payment block.

   If, however, you have entered an **alternative payee** for the vendor, you can set a posting block for the vendor and still effect payment by posting the payment to the alternative payee (if bankruptcy proceeding are instituted against the vendor, for example).

Setting a Posting, Sales and Distribution, or Purchasing Block

1. On the Change Customer: Initial Screen [Ext.] or the Change Vendor: Initial Screen [Ext.] enter the following data, if it is relevant to the block:

   - Customer number or vendor number
   - Company code
   - Sales area (sales organization, distribution channel, division)
   - Purchasing organization

   – To set blocks for customers, proceed as follows:

     Choose *Enter*. The *Change Customer: General Data* tab appears.

   – To set blocks for vendors, proceed as follows:

     Select any view, for example, the *Address* field in the *General data* section of the screen. The system needs one entry to display the screen that contains the blocking data.

   Choose *Enter*. The *Change Vendor: Address* screen appears.

2. Choose *Extras →Blocking data*.

   The Change Customer: Blocking Data screen or Change Vendor: Blocked Data screen appears.

3. Make the following selections or entries as appropriate:

   – Posting block

     Select the *All company codes* field in the *Posting block* field group to set a posting block for **all** company codes. Select the *Selected (*or *Specified) co. code* field to set a posting block for **one** company code only, (the posting block is set for the company code entered on the initial screen).

   – Sales and distribution blocks

     Enter a blocking key for one or more of the following blocks in the *Sales and distribution blocks* field group:

     - Sales Order block
     - Delivery block
     - Billing block

     Enter the blocking key in the *All sales areas* field to set a block for the customer in **all** sales areas. Enter the blocking key in the *Selected sales area* field if the block must only be valid in **one** sales area (the block is set for the sales area entered on the initial screen).

     Select the *All sales areas* field or the *Selected sales area* field for *Block sales support* to set a block for customer sales support in all sales areas or in individual sales areas.

– Purchasing block

  Select the *All purchasing organizations* field in the *Purchasing block* field group to set a block for **all** purchasing organizations. Select the *Selected purchasing organization* field to set a block for **one** purchasing organization only, (the block is set for the purchasing organization entered on the initial screen).

4. Save. The blocks are effective as soon as you set them.

   To delete a posting, sales and distribution or purchasing block, follow the same procedure.

Setting a Purchasing Block for Sites and Vendor Sub-Ranges

Prerequisites

You can only set a vendor purchasing block specific for a particular site or vendor sub-range if you have maintained data at these organizational levels, and if this data is different from the data maintained at the purchasing organization level.

Procedure

1. On the Change Vendor: Initial Screen [Ext.] enter the vendor number and the purchasing organization for which the block is valid.

   Select the *Purchasing data* view in the *Purchasing organization data* section and choose *Enter*.

   The *Change Vendor: Purchasing Data* screen appears.

2. Choose *Extras →Alternative data*.

   The *Change Vendor: Different Data* screen appears.

3. Select the organizational level (at which the different data is maintained) which you want to block for purchasing activities. You can select:

   – A vendor sub-range

   – A site

   – Both a vendor sub-range and a site

4. Choose *Purchasing details.*

   The *Change Vendor: Dif. Purch. Data* screen appears.

5. Choose *Extras →Purchasing block*.

   The *Change Vendor: Purchasing Block* pop-up appears.

6. Select the field *Purchasing block* and choose *Enter*.

7. Save.

Setting a Block for Quality Reasons

Prerequisites

In the vendor master, a block for quality reasons is only of importance in connection with Quality Management (QM). The QM procurement key must be entered in the article master.

Procedure

1. On the Block/Unblock Vendor: Initial Screen [Ext.] enter the vendor number. Choose *Enter.*

   The *Block/Unblock Vendor: Details* screen appears.

2. Choose the blocking key for the *Block for quality reasons* field.
3. Save.