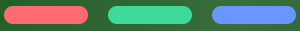


No. 24

SAP SALES

SAP SD Security

Sales and distribution authorizations in SAP S/4HANA, explained for beginners



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BEFORE YOU BEGIN

How to use this book

What this book covers, who it is for, and how to use it.

Sales and Distribution, usually called **SD**, is where a company turns customer demand into revenue. Orders are entered, goods are shipped, invoices are created and payments are expected. Each of these steps creates documents that are worth protecting: a changed price, a released credit block or a cancelled invoice can cost real money.

This book explains **how to secure SD in SAP S/4HANA** for people who are new to SAP security or new to the sales area. It covers the organizational structure, the main authorization objects, customer master data, pricing, credit management, deliveries, billing, segregation of duties, SAP Fiori business roles and day-to-day monitoring.

Which versions this book covers

The book is written for **SAP S/4HANA 2023 and 2025** (on-premise and Private Edition), and points out where **SAP S/4HANA Cloud Public Edition** works differently. Where SAP ECC behaviour still matters, for example during a conversion project, it is mentioned and marked as legacy. SAP ECC 6.0 mainstream maintenance ends at the end of 2027, with optional extended maintenance to the end of 2030.

Who this book is for

- **New SAP security analysts** who are asked to build or fix sales roles.
- **SD consultants and key users** who want to understand why a user "has no authorization".

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- **Auditors and controllers** who review order-to-cash access.
- **Project members** on an S/4HANA conversion who need to redesign sales roles.

How the book is organized

- **Part I — Foundations** (Chapters 1–3): what SD does, what changed in S/4HANA, and a short refresher on SAP authorizations.
- **Part II — Securing the process** (Chapters 4–10): organization, sales documents, the customer business partner, pricing, credit management, deliveries and billing.
- **Part III — Control and operation** (Chapters 11–16): segregation of duties, SAP Fiori roles, monitoring, interfaces and conversion projects, a worked example and checklists.

Conventions

TIP
Practical advice you can apply straight away.

IN SAP
Product-specific details and names.

WATCH OUT
Common misunderstandings.

KEY IDEA
The one thing to remember from a section.

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A note on screens, objects and examples

Screens are **simplified illustrations**, not copies of SAP screens. Authorization object names come from SAP's standard; always confirm the exact fields and checks in your own system with transaction **SU21**, **SU24** and an authorization trace, because releases and support packages change details. Company names, users and values are invented examples.

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PART I

Foundations

Before building roles, it helps to understand what the sales area does, what changed in SAP S/4HANA, and how SAP authorizations work in general.

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CHAPTER 1

What SD does and why it needs protecting

SD covers the order-to-cash process. Knowing the steps tells you where the risks are.

The order-to-cash process

SD supports the **order-to-cash** process: everything from a customer's first inquiry to the money arriving in the bank.



Figure 1.1 The order-to-cash process and its main documents.

1. **Inquiry and quotation** — the customer asks, the company offers prices and dates.
2. **Sales order** — the binding agreement: what, how many, at what price, when.
3. **Delivery** — warehouse staff pick, pack and post the **goods issue**, which reduces stock and posts cost of goods sold.
4. **Billing** — an invoice (or credit or debit memo) is created and released to accounting.
5. **Payment** — handled in Finance (accounts receivable), outside SD itself.

Around this flow sit **master data** (customers, materials, prices) and **controls** (credit checks, blocks, approvals).

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What can go wrong

Most SD risks are not exotic hacking scenarios. They are ordinary people doing more than their job requires:

- A sales clerk **changes a price** or adds a discount that was never approved.
- Someone **releases a credit block** on their own order so a risky customer gets goods.
- A user **creates a fictitious customer** and bills it, or redirects a credit memo.
- Goods are **shipped without billing**, or invoices are **cancelled** to hide revenue.
- Staff in one country **read or change orders** for another country they should not see.

Good SD security limits each person to the documents, organizational units and activities their job needs, and separates steps that should not be in one hand.

> **KEY IDEA**
> SD security is about **who may do what, for which part of the organization**. Almost every SD authorization check combines an activity (create, change, display) with an organizational value (sales organization, shipping point) or a document type.

Who uses SD

- **Inside sales representatives** create and change quotations and orders.
- **Shipping specialists** process deliveries and post goods issue.
- **Billing clerks** create and release invoices.
- **Credit controllers** review and release credit blocks.
- **Master data specialists** maintain customers and prices.
- **Sales managers and analysts** mostly display and report.

These job profiles become the backbone of your role design in Chapter 15.

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CHAPTER 2

SD in SAP S/4HANA today

SAP S/4HANA kept the SD core but changed several areas around it. Those changes affect your roles.

The core stays, the edges change

Sales orders, deliveries and billing documents work much as they did in SAP ECC, and the main SD authorization objects still apply. What changed is the area around them.

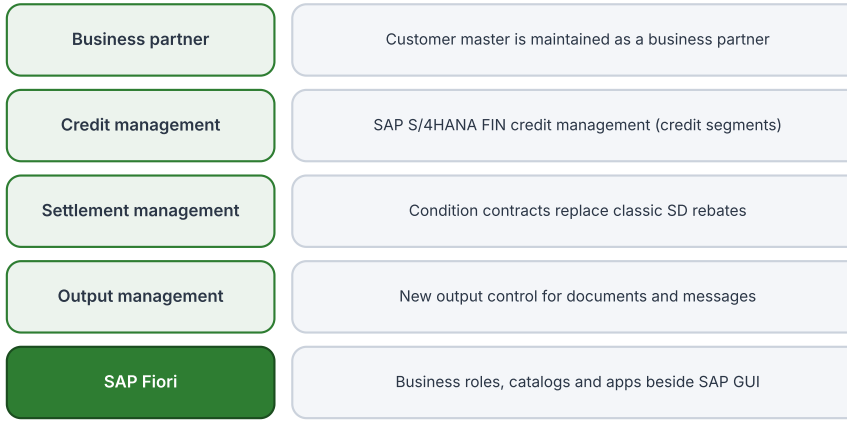


Figure 2.1 Areas that changed for SD in SAP S/4HANA.

Business partner replaces customer master transactions

In S/4HANA the **business partner** is the single entry point for customers and suppliers. The old customer transactions are replaced by business partner maintenance, and customers are a **role** of a business partner. Authorizations therefore

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include business partner objects (such as **B_BUPA_GRP** and **B_BUPA_RLT**) as well as the classic customer objects for sales area and company code data. Chapter 6 covers this.

Credit management moved to Finance

The classic SD credit management of ECC is replaced by **SAP S/4HANA FIN credit management**, organized around **credit segments**. Credit blocks still appear in sales documents, but credit limits and credit analysis live in the finance component. The people who set limits and the people who release blocks need different roles.

Settlement management for rebates

Classic SD rebate agreements are replaced in S/4HANA by **condition contracts** in **settlement management**. If your company pays volume rebates, the people who maintain and settle condition contracts need their own, carefully restricted access.

Output management

S/4HANA introduced a new **output management** for printing and sending sales documents. Access to change output settings or reprint documents should be limited, because invoices are legally relevant documents.

SAP Fiori and business roles

Users increasingly work in **SAP Fiori** apps such as Manage Sales Orders or Manage Prices - Sales. SAP delivers **business role templates** (for example SAP_BR_INTERNAL_SALES_REP and SAP_BR_BILLING_CLERK) that you copy and adapt. Chapter 12 explains how these map to authorization objects.

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