

Outline Agreements in SAP CRM

SAP CRM is an effective and easy to use software tool that enables customers of all sizes to release or sell services or products at conditions agreed upon previously. What is really good about Outline Agreements in SAP CRM is that you get to define conditions that will have an impact on the release of services or products like terms of delivery, price, and so on. Furthermore, these agreements are all binding on services and products that are sold in agreement to it. With these agreements in place, customer retention can be achieved easily and without any hassle.

It is based on business transactions on which agreements and contracts are made and signed. You'll find business transactions structured like –

- **Header** – It will typically contain relevant information that is required to complete a transaction like status transactions, dates, BP number, etc.
- **Items** – This section defines the services or products to which the business transaction can relate to. Helps indicates what the items or sub-items are and their complete status.

Functions that can be used for Outline Agreements in SAP CRM

- **Releasable Product Details** – This is the section where you can define the services or products that a customer can release against an established contract.
- **Price Agreements** – Special price agreements are determined in this section by entering conditions on which outline agreements are made.
- **Target Quantity** – This section will determine the quantity of services or products that the customer can release.
- **Cancellation Procedure** – The cancellation procedure will be determined here, like who'll be authorized to cancel the contract, notice period, and terms of cancellation.
- **Date Rules** – In this section, you can enter the start date and end date of your contract as well as its duration. Also, you can either enter the dates manually or establish date rules for clearly defining the start and end date of the contract.
- **Completion Rules** – This is the section that will define how the system will behave when the customer releases the full quantity of services or product that is under contract.
- **Activities and Actions** – This is where you can define the actions that can be performed once the contract is about to expire and various follow-up activities that can be carried out at this stage.
- **Card Payment** – In this section, you'll enter all the card information for payment against the contract. However, authorization and validation will not take place in the system. It is only when the customer releases the services or products as per the terms of the contract the system will move the card information for authorization and validation to take place.

Checking Availability

This function is carried out to validate whether or not a product or service is available to be added in the sales order. What checking availability does is allows you to check whether there is enough stock is there or should be purchased or produced to have the sales order placed successfully.

What it is really special with checking availability feature is that it can be carried out in different systems and the so collected information is passed on to purchasing or production units.

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