

SAP CRM - OUTLINE AGREEMENTS

Advertisements

An **outline agreement** is defined as an agreement that allows a customer to release the products or services at previously agreed conditions. You can define conditions like price, terms of delivery, etc. and these conditions are true for all sales orders that customer creates with reference to sales agreement. These outline agreements are used for customer retention.

Contracts and agreements are based on business transactions. These business transactions are structured as –

- **Header** – The header contains the information relevant to complete transaction like BP number, Dates, status of transactions etc.
- **Items** – This defines the product to which business transaction relates. Items and sub-items and their status.

The following functions can be used in an outline agreement in sales –

- **Releasable Product Details** – Here you can define the products that a customer can release against the contract.
- **Target Quantity** – This determines the quantity of a product the customer can release.
- **Price Agreements** – This is used to determine special price agreements by entering conditions in an outline agreement.
- **Cancellation Procedure** – Here you determine the cancellation procedure – who is authorized to cancel the contract, terms of cancellation and notice period.
- **Date Rules** – You can enter the contract start date and end date and duration of contract. Dates can be entered manually or you can create date rules for determining start and end date of contract.
- **Completion Rules** – Here you define the completion rule like how the system will act on contract when customer release the full quantity of the product.
- **Card Payment** – Payment via card information can be added to contract but validation and authorization doesn't take place in the system. When the customer releases products as per the agreement, system moves the card information to release order and authorization is done at that time.
- **Activities and Actions** – You can define the actions to be performed and follow up activities for a contract when it is about to expire.

Availability Check

The availability check is used to validate if a product is available to be added in a Sales order. This allows you to perform a check if enough stock is available or can be produced or purchased for the sales order to be placed.

Availability check can be performed in different systems and information is transferred to production or purchasing.

Availability check can be performed in the following systems –

- **SAP Advanced Planning and Optimization (SAP APO)** – You can find more information under Availability Check Using SAP APO.
- **SAP ERP Central Component (SAP ECC)** – You can find more information under Availability Check Using SAP ECC.
- **External (non-SAP) systems** – You can also use your own ATP system to carry out the availability check or obtain availability information.