SAP CRM - SERVICE ORDER MANAGEMENT

Service Order management is used for the delivery of service parts to the customer. You can use service order quotation to quote a price for a defined service and later quotation can be copied to service order after the approval from customer.

You can define date settings in customizing for Customer Relationship Management by selecting Date Management under the Basic Functions in CRM.

Following is the list of some of the predefined date types for a standard service transaction type.

Transaction Type	Date Profile	Date Type
Service Order Template SRVT	SRV_Template	VALIDFROM and VALIDTO
Service Order Quotation SRVQ	SRV_QUOT	QUOTSTART and QUOTEND
Service Order SRVO	SRV_HEADER01	SRV_CUST_BEG and SRV_CUST_END

Complaints and Returns Management

Complaints can be used both in service and sales. Complaints can be created for in-house repair, billing related, returns or any deliveries which doesn't satisfy the customer.

Returns can be used for the goods delivered to a customer. A customer can also return a service part which was not used.

Transaction and item categories are predefined for complaints in the standard system.

CRMC – Complaint	COMP – Complaint L2N – Debit Memo Request G2N – Credit Memo Request TANN – Free of Charge Substitute Delivery REN – Return Request	Main item Subitem Subitem Subitem Subitem

In a similar way, various return types can be created in the system depending on the customizing.

- **Standard Returns –** A Standard return is used when a customer has placed an order for a few items via mail delivery in many different sizes or colors and a few of those articles are returned after the trial. As there is no manufacturing defect in the goods, so no complaint is raised with the return.
- **Surplus Returns –** These are performed for the parts that the vendor didn't sell as high as expected by the customers.
- **SPL–requested Returns –** These special requested returns differ from one category to another.
- **Recall Returns –** This can be due to a manufacturing defect.
- **Rapid Returns –** A rapid return is performed for the articles which are marked as non-returnable.

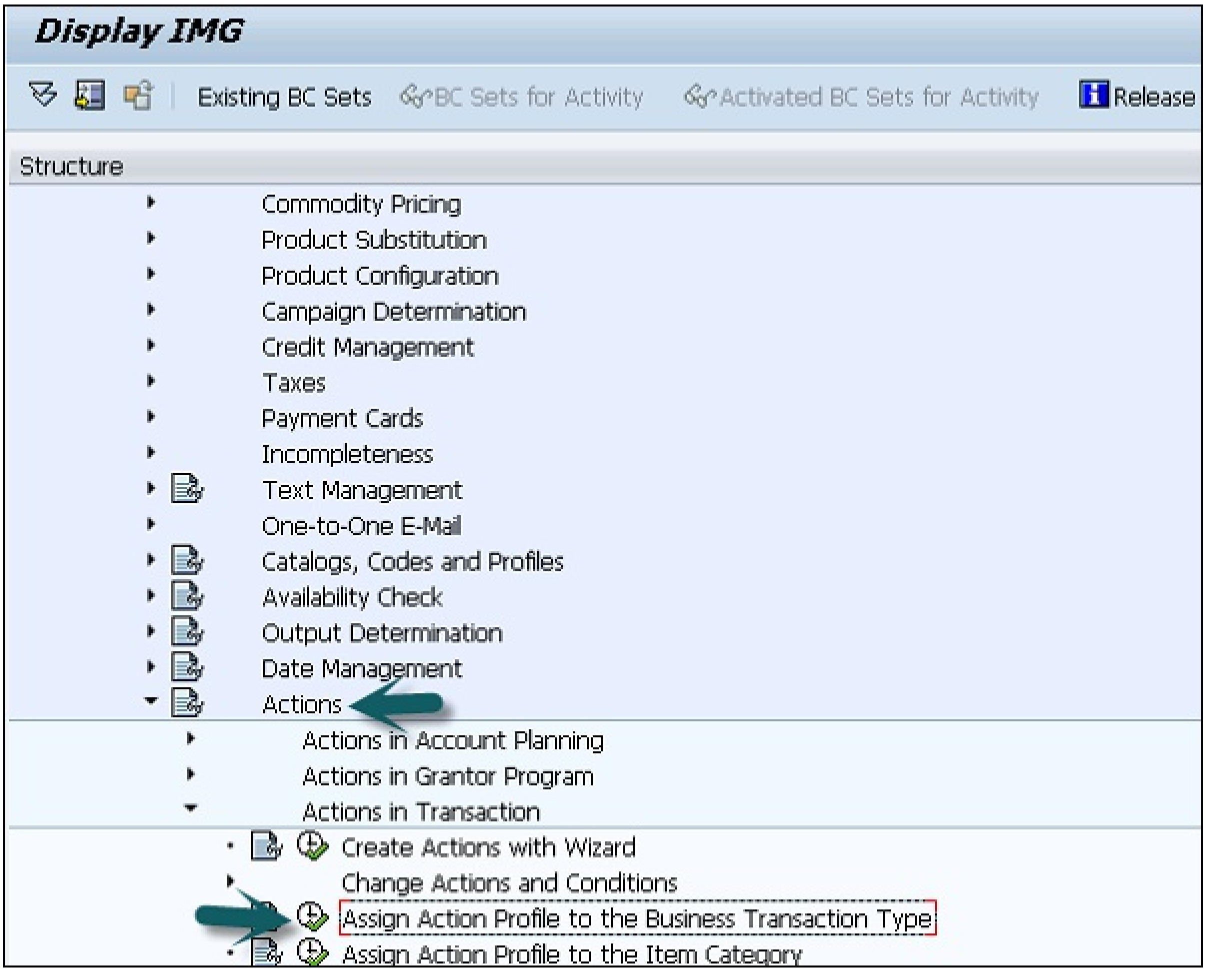
Workflow and Escalation Management

When a service order is processed, there is a possibility that time target defined in the **Service Level Agreements** (SLA) are not met nor there are service requests which are not completed in the defined time frame as per the SLA. In this scenario, predefined follow up activities are triggered as escalation measure.

You can define two different escalation levels to notify the designated parties that SLA has been crossed for the service request. First level escalation is triggered when SLA is crossed for the first time. Second level escalation is triggered when the first level crosses its time limit.

Escalations are managed and controlled with the use of actions.

Go to **SPRO → IMG → Customer Relationship Management → Basic Functions → Actions → Actions in Transaction → Assign Action Profile to the Business Transaction Type**.



You can also create a batch job to automatically escalate service requests that are crossing their service level agreements.

T-Code: SE38

For each action, create a variant for the program "RSPPFPROCESS" to identify the actions and service requests you want to include in the batch job.

For each variant, define a batch job, Use the **T-code SM36** and mention when to run the batch job.

Warranty Claim Services

Warranty management is used to identify warranties while processing service business transactions like service order and complaints. It is used to perform a check if claim for a warranty is authorized and to monitor the warranty cost and also determine warranty effect on the billing of that service.

Warranty claim processing allows service providers to submit the warranty claims on behalf of the customers. High volume of warranty claims can be processed depending on the customizing settings.

Sending Warranty Claims

Warranty claims can be sent to vendors by the following ways –

- Send the claim by fax or in an email.
- You can directly link the claim to the vendor system.

Business transactions and item category for outbound claim is defined in the standard CRM system −

- Business transaction CLMA Outbound warranty claim.
- Item Category CLMP Warranty claim item.