

User's Guide for Terms and Conditions

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About this document

Objectives

The objective of this guide is to describe the purpose of the Terms and Conditions (TRM) module and how you can set up and use terms and conditions in ERP LN.

Document summary

Chapter number	Content
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Chapter 1	An overview of terms and conditions
Chapter 2	To set up terms and conditions
Chapter 3	Terms and conditions templates
Chapter 4	To retrieve terms and conditions

How to read this document

This document was assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to *Introduction*. To locate the referred section, please refer to the Table of Contents or use the Index at the end of the document.

At the end of this document, a glossary is included. Terms explained in the glossary are presented as shown in the following example:

In Common Data, you can link addresses to business partners.

If you view this document online, you can click these terms to go to the term's definition in the glossary.

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- To find your local support phone number, click **Contact Infor** in the top right corner of the home page, enter a product name, and click **Search**.

Chapter 1

Overview of Terms and Conditions

1

Overview of terms and conditions

If you use functionalities such as vendor managed inventory (VMI), subcontracting, and allocations in your company, multiple terms and conditions are involved between business partners. The Terms and Conditions module allows you to set up terms and conditions agreements, which hold all terms and conditions that are applicable in a particular situation between business partners. For example, in a terms and conditions agreement, you can register the terms and conditions regarding the financial ownership of goods for a specific functionality.

The following types of terms and conditions agreements are available:

- **Purchase**
A purchase agreement must be linked to a purchase contract before you can use it.
- **Sales**
A sales agreement must be linked to a sales contract before you can use it.
- **Internal**
An internal agreement must be linked to an enterprise unit relationship before you can use it.

To define terms and conditions, refer to *To set up terms and conditions (p. 2-1)*.

Terms and conditions templates

In a terms and conditions agreement, lots of data can be entered. To facilitate data entry, you can store default data in a terms and conditions template. A template is a default terms and conditions agreement, representing a business process, that has no business partner linked to it. The level of detail of the template data is user-definable. Based on this template, you can quickly generate new terms and conditions agreements for business partners.

Terms and conditions templates also allow you to do the following:

- Update multiple existing terms and conditions agreements derived from a specific template simultaneously.
- Validate whether the generated terms and conditions agreements meet the business process represented by the template.

For more information, refer to *Terms and conditions templates (p. 3-1)* .

Terms and conditions retrieval

If you use terms and conditions, an extensive search mechanism is used to retrieve the correct terms and conditions regarding the sale, purchase, or transfer of specific goods.

For more information, refer to *To retrieve terms and conditions (p. 4-1)* .

Chapter 2

To set up Terms and Conditions

2

To set up terms and conditions

You can store terms and conditions agreed between business partners in a terms and conditions agreement.

Terms and conditions master data

Before you can define terms and conditions agreements, set up the following master data:

Step 1: Implemented Software Components (tccom0100s000)

In the Implemented Software Components (tccom0100s000) session, select the following check boxes:

- **Terms and Conditions**
- **Ownership Internal** or **Ownership External**

Step 2: Warehouse Sets (tctrm0610m000)

To define terms and conditions for a group of warehouses, define a warehouse set and link warehouses to it in the Warehouse Sets (tctrm0610m000) session.

To automatically import warehouses into a warehouse set, use the Generate Warehouse Set (tctrm0210m000) session.

Step 3: Attribute Sets (tctrm0601m000)

For each type of terms and conditions agreement, which can be **Purchase**, **Sales**, or **Internal**, define an attribute set and search attributes that must be linked to the attribute set. For search attributes (fields) not linked to an attribute set, you cannot set up terms and conditions.

If you defined a warehouse set, before you can set up its terms and conditions, you must link the warehouse set as a search attribute to the attribute set.

Step 4: Terms and Conditions Parameters (tctrm0100m000)

Use this session to do the following:

- Define the number group for all terms and conditions agreements.
- Define the series for the different terms and conditions types.
- Link the terms and conditions attribute sets to the different terms and conditions types.
- Define a method to search for items within internal terms and conditions agreements.

Terms and conditions agreements

After defining the master data, set up a terms and conditions agreement:

Step 1: Terms and Conditions (tctrm1600m000)

In the Terms and Conditions (tctrm1600m000) session, enter:

- An agreement header with the type of agreement and the business partners.
- Search levels, which include the following:
 - A selection of search attributes (fields), which you can further specify on the terms and conditions line.
 - A priority level for searching and selecting the terms and conditions line.
 - A selection of linked terms and conditions groups, for which you can define the details in the Terms and Conditions Line (tctrm1620m000) session.

Step 2: Terms and Conditions Search Level - Lines (tctrm1610m000)

To start the Terms and Conditions Search Level - Lines (tctrm1610m000) session, in the Terms and Conditions (tctrm1600m000) session, double-click a search level.

Use the Terms and Conditions Search Level - Lines (tctrm1610m000) session to do the following:

- Define a specific terms and conditions search level.
 - Link terms and conditions lines to the search level. On a terms and conditions line, you enter the values for the search attributes of a terms and conditions search level. In other words, you specify the fields to which the detailed terms and conditions, as stored in the terms and conditions groups, apply.
-

Step 3: Terms and Conditions Line (tctrm1620m000)

To start the Terms and Conditions Line (tctrm1620m000) session, in the Terms and Conditions Search Level - Lines (tctrm1610m000) session, double-click a line. In this session, specify the terms and conditions details agreed with your business partner.

Use the Terms and Conditions Line (tctrm1620m000) session to do the following:

- Define a specific terms and conditions line.
- Define the terms and conditions details for the terms and conditions groups you previously selected in the Terms and Conditions (tctrm1600m000) and Terms and Conditions Search Level - Lines (tctrm1610m000) sessions.

You can define details regarding the following:

- Orders
- Planning
- Logistics
- Invoicing
- Allocation and hard pegging

Note

To generate a terms and conditions agreement from a template, use the Generate Terms and Conditions from Template (tctrm2200m000) session. For more information, refer to *Terms and conditions templates (p. 3-1)* .

Terms and conditions templates

Terms and conditions templates allow you to do the following:

- Generate new terms and conditions agreements for business partners.
- Update existing terms and conditions agreements.
- Validate terms and conditions agreements.

To generate terms and conditions agreements based on a template

A template is a generic terms and conditions agreement not applicable to any business partner. Usually, the template data represents a business process. For setting up terms and conditions for a business partner, you can use a template to copy the data from. Therefore, you can store default data in a terms and conditions template, which facilitates data entry in a terms and conditions agreement.

Before you can generate agreements from a template, you must complete the following steps:

Step 1: Set up master data

Set up the terms and conditions master data. For details, refer to *To set up terms and conditions (p. 2-1)*.

Step 2: Enter a template header

In the Terms and Conditions - Templates (tctrm1600m100) session, enter a template header and select a terms and conditions type.

Step 3: Define template data at different levels

You can add lots of data to the template at various levels. The level of detail of the template data is user-definable.

For example, a template can contain the following:

- Search levels.
- Search levels, lines, and terms and condition details.
- One search level with empty search attributes, lines, and terms and condition details.
- Search levels with filled attributes, lines with empty attributes, and detailed terms and conditions.

You can define the various levels in the following sessions:

- Terms and Conditions (tctrm1600m000)
- Terms and Conditions Search Level - Lines (tctrm1610m000)
- Terms and Conditions Line (tctrm1620m000)

For details about these sessions, refer to *To set up terms and conditions (p. 2-1)*.

Step 4: Generate a terms and conditions agreements from a template

In the Generate Terms and Conditions from Template (tctrm2200m000) session, enter the template from which a new agreement must be generated.

- If you start this session from the Purchase Contract - Lines (tdpur3600m000) session, or the Sales Contract - Lines (tdsls3600m000) session, the newly generated agreement is automatically linked to the (**Free**) contract.
- If you start this session from the Enterprise Unit - Enterprise Unit Relationships (tceem0134m000) session, the newly generated internal agreement is automatically linked to the enterprise unit relationship.

If the template contains lines with empty attributes and detailed terms and conditions, the newly generated agreement only contains a header and search levels. Therefore, in the Terms and Conditions Line (tctrm1620m000) session or the Terms and Conditions Lines (tctrm1120m000) session, you must do the following:

- Manually enter the terms and conditions lines.
- Copy the detailed terms and conditions from the template by clicking **Generate Default Terms and Conditions** on the **Specific** menu.

To update terms and conditions agreements based on a template

Because business processes change, you can also make changes to the template. These changes can be copied to the terms and conditions agreements generated from the template.

To update the terms and conditions agreement(s) with the template changes, the following steps are completed:

Step 1: Terms and Conditions derived from Template (tctrm2100m000)

ERP LN updates the Terms and Conditions derived from Template (tctrm2100m000) session when a terms and conditions agreement is generated from the template and uses this session to view which terms and conditions agreements must be included in the global update process. During the global update process, template changes are copied to the linked terms and conditions agreement(s).

Step 2: Template Changes (tctrm2105m000)

If at least one terms and conditions agreement is generated from the template, the Template Changes (tctrm2105m000) session registers the changes made to the template.

The following types of changes are registered:

- **Add**
A new record is added to the template.
- **Delete**
A record is deleted from the template.
- **Change**
A change is made to a field in the template.

To include the template change in the global update process, select the **Use in Global Update** check box.

Step 3: Global Update of Terms and Conditions (tctrm2205m000)

Use this session to globally update the terms and conditions agreements derived from the template, with the changes made to the template.

In this session, you must select the type of agreement that must be updated. You can also select the following check boxes:

- **Simulate**
The process is performed, but the agreements are not yet updated with the template changes. For example, you can use this check box to generate and check the error report before you update the agreements.
 - **Overwrite Manual Changes**
The relevant data in the terms and conditions agreement is overwritten with the template change data. Therefore, if you already manually changed data in the terms and conditions agreement, these changes are overwritten. If you do not select this check box, the template change data only overwrites
-

the terms and conditions agreement data if the template's **Old Value** is equal to the current value in the terms and conditions agreement.

- **Remove Template Changes**

The template changes are removed from the Template Changes (tctrm2105m000) session after the terms and conditions agreements are updated with these changes. You can also remove the template changes with the Global Delete Template Changes (tctrm2205m100) session.

To validate terms and conditions agreements against a template

To validate a terms and conditions agreement against a template, you must first run the search simulation process from the Terms and Conditions - Searches (tctrm2150m000) session. For details, refer to *To retrieve terms and conditions (p. 4-1)*.

To enable the validation process, the following steps are completed:

1. In the **Validation Template** field of the Terms and Conditions - Searches (tctrm2150m000) session, a template is entered.
 2. The retrieved terms and conditions agreement is validated against the entered **Validation Template** after clicking **Print match with Validation Template** on the **Specific** menu of the Terms and Conditions - Search Results (tctrm2151m000) session.
 3. For the defined search attributes in the Terms and Conditions - Searches (tctrm2150m000) session, the applicable terms and conditions are retrieved.
 4. For the same search attributes, the applicable terms and conditions are retrieved from the validation template.
 5. The terms and conditions that differ from the values in the validation template are marked with an asterik on the report.
-

Chapter 4

To retrieve Terms and Conditions

4

To retrieve terms and conditions

Terms and conditions regarding the sale, purchase, or transfer of specific goods can be defaulted to an order or schedule from an **Active** contract or enterprise unit relationship. Therefore, you must link the defined terms and conditions agreements in the following sessions:

- Purchase terms and conditions agreements must be linked to a normal purchase contract in the Purchase Contract - Lines (tdpur3600m000) session, or the Purchase Contracts (tdpur3100m000) session.
- Sales terms and conditions agreements must be linked to a normal sales contract in the Sales Contract - Lines (tdsls3600m000) session, or the Sales Contracts (tdsls3500m000) session.
- Internal terms and conditions agreements must be linked to an enterprise unit relationship in the Enterprise Unit - Enterprise Unit Relationship (tceem0634m000) session, or the Enterprise Unit - Enterprise Unit Relationships (tceem0134m000) session.

The terms and conditions agreements can be linked as follows in the previous sessions:

- Manually, by selecting an agreement from the Terms and Conditions (tctrm1100m000) session.
- By generating an agreement from a template, which is automatically linked to the relevant session. To start the Generate Terms and Conditions from Template (tctrm2200m000) session, click **Generate Terms and Conditions from Template** on the **Specific** menus. For more information, refer to *Terms and conditions templates (p. 3-1)*.

Note

The following can be linked to a contract:

- A terms and conditions agreement and contract lines.
- Only a terms and conditions agreement and no contract lines.

- Only contract lines and no terms and conditions agreement.

Therefore, terms and conditions and contract lines are retrieved separately from each other.

- Terms and conditions are retrieved based on business partner and search date.
- Contract lines are retrieved based on business partner, item (group), and search date.

The search date is determined by the following parameters:

- **Terms and conditions**
For purchase orders or schedules, the **Search Date for Terms and Conditions** parameter in the Purchase Order Parameters (tdpur0100m400) session.
- For sales orders or schedules, the **Search Date for Terms and Conditions** parameter in the Sales Order Parameters (tdsls0100s400) session.
- **Contract lines**
For purchase orders or schedules, the **Price Date Type** parameter in the Pricing Parameters (tdpcg0100m000) session.
- For sales orders or schedules, the **Price Date Type** parameter in the Pricing Parameters (tdpcg0100m000) session.

To simulate the retrieval of terms and conditions

Before or after terms and conditions are defaulted to an order or schedule, you can simulate the retrieval of terms and conditions. Therefore, you can view which terms and conditions are effective in a specific situation.

You can initiate the search simulation process from the following sessions:

- The Purchase Order Lines (tdpur4101m000) session, Sales Order Lines (tdsls4101m000) session, Inbound Order Lines (whinh2110m000) session, or Outbound Order Lines (whinh2120m000) session, by clicking **Terms and Conditions** on the **Specific** menu. Therefore, the terms and conditions are shown based on the order line data.
- The Terms and Conditions - Searches (tctrm2150m000) session, in which you must enter your own search attributes and **Search Date**.

The terms and conditions search results are displayed in the following sessions:

- Terms and Conditions - Search Results (tctrm2151m000) for **Sales** and **Purchase** agreements.
 - Terms and Conditions - Search Results (tctrm2151m300) for **Internal** agreements.
-

To retrieve sales and purchase terms and conditions

To retrieve sales or purchase terms and conditions for a business partner, ERP LN completes the following steps:

1. Determines the sales or purchase contract **Active** for the business partner based on the **Terms and Conditions Type**, sold-to business partner or buy-from business partner, and **Search Date**.
2. Reads the **Terms and Conditions ID** from the found sales or purchase contract.
3. Determines, for the terms and conditions agreement, the detailed terms and conditions applicable for the business partner based on the search attributes (fields) and **Search Date**.

Note

To retrieve terms and conditions from an **Active** contract for an order line, the contract need not be linked to the order line. The contract number is only filled on the order line if an active contract line is linked to the order line.

To retrieve internal terms and conditions

To retrieve internal terms and conditions, ERP LN completes the following steps:

1. Determines the applicable enterprise unit relationship for the internal business partners based on the **From Enterprise Unit**, **To Enterprise Unit**, and **Search Date**.
2. Reads the **Internal Terms and Conditions** from the found enterprise unit relationship.
3. Determines, for the terms and conditions agreement, the detailed terms and conditions applicable for the internal business partners based on the search attributes and **Search Date**.

Note

If internal terms and conditions are searched for, a from item and a to item are used. Therefore, two terms and conditions records can be applicable. The **Search Sequence for Item Transfer** field in the Terms and Conditions Parameters (tctrm0100m000) session determines which item has the highest priority.

Note

- Enterprise Planning can require terms and conditions for a range of data. In this case, ERP LN returns the effective terms and conditions for that period, which can be retrieved from different contracts.
- You can view the steps carried out by ERP LN to obtain the terms and conditions search results in the Terms and Conditions - Search Results Log (tctrm2151m200) session.

Example: Retrieving terms and conditions

The following terms and conditions are linked to purchase contract AVK000026 for buy-from business partner GWABC.

Terms and Conditions Type Purchase

Terms and Conditions ID PUR000028

Buy-from Business Partner GWABC

The detailed terms and conditions defined in the various terms and conditions groups for agreement PUR000028 are all effective at the purchase order's search date.

In the Terms and Conditions (tctrm1600m000) session, the following terms and conditions search levels are defined for agreement PUR000028.

Search Level	Priority	Attribute 1	Attribute 2	Order	Planning	Logistics	Invoicing	Allocation
1	10	Item	Not Applicable	No	No	No	No	Yes
<i>201060.000</i>								
2	20	Item	Warehouse	Yes	No	No	No	No
<i>201075.000 S033</i>								
<i>201080.000 S034</i>								
3	30	Item Group	Warehouse	No	Yes	Yes	No	No
		<i>GWS</i>	<i>S033</i>					
		<i>001</i>	<i>S050</i>					
4	40	Invoice-from BP	Not Applicable	No	No	No	Yes	No

GWABC

5	50	Not Applicable	Not Applicable	Yes	No	No	Yes	No
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For each search level, the attribute values shown in *italics* in the table are entered in the Terms and Conditions Search Level - Lines (tctrm1610m000) session. *Yes* and *No* in the table indicates whether detailed terms and conditions are present for the relevant terms and conditions group.

Note

For purchase terms and conditions, the warehouse refers to the warehouse in which the goods are received. For sales terms and conditions, the warehouse refers to the warehouse from which the goods are delivered.

In the Purchase Order - Lines (tdpur4100m900) session, the following purchase order lines are present:

Purchase Order Line	Invoice-from BP	Item	Item Group	Warehouse
10	GWABC	201060.000	GWS	S033
20	GWABC	201075.000	GWS	S033
30	GWABC	201080.000	GWS	S034
40	GWABC	201095.000	001	S101

The following terms and conditions are retrieved for the purchase order lines:

Terms and Conditions Retrieved

Purchase order line	Order	Planning	Logistics	Invoicing	Allocation and Hard Pegging
10	Search level 5		Search level 3	Search level 4	Search level 1
20	Search level 2	Search level 3	Search level 3	Search level 4	

30	Search level 2	Search level 4
40	Search level 5	Search level 4

To retrieve terms and conditions for an order line, in the Purchase Order - Lines (tdpur4100m900) session, select a line and on the **Specific** menu, click **Terms and Conditions**.

■ **Order line 10**

Order terms and conditions are retrieved from search level 5. Because no search attributes are defined for search level 5, these terms apply to all search attributes combinations. Order terms and conditions are also defined for search level 2. However, these terms and conditions do not apply to line 10 because item 201060.000 in order line 10 does not match search attribute item 201075.000 or item 201080.000 in level 2.

Logistics terms and conditions are retrieved from search level 3; this is, because search attribute item group GWS and search attribute warehouse S033 of this level match the item group and the warehouse in order line 10.

Invoicing terms and conditions are retrieved from search level 4 because search attribute invoice-from business partner GWABC matches the order line's invoice-from business partner.

Allocation and hard pegging terms and conditions are retrieved from level 1 because the item in line 10 matches search level attribute item 201060.000.

■ **Order line 20**

Order terms and conditions are retrieved from search level 2 because search attributes item 201075.000 and warehouse S033 match the item and the warehouse in order line 20.

Planning and Logistics terms and conditions are retrieved from search level 3 because search attribute item group GWS and search attribute warehouse S033 of this level match the item group and warehouse in order line 10.

Invoicing terms and conditions are retrieved from search level 4 because search attribute invoice-from business partner GWABC matches the order line's invoice-from business partner.

■ **Order line 30**

Order terms and conditions are retrieved from search level 2 because search attributes item 201080.000 and warehouse S034 match the item and warehouse in order line 20.

Invoicing terms and conditions are retrieved from search level 4 because search attribute invoice-from business partner GWABC matches the order line's invoice-from business partner.

- **Order line 40**

Invoicing terms and conditions are retrieved from search level 4 because search attribute invoice-from business partner GWABC matches the order line's invoice-from business partner.

Order terms and conditions are retrieved from search level 5. Because no search attributes are defined for search level 5, these terms apply to all combinations of search attributes. Order terms and conditions are also defined for search level 2. However, these terms and conditions do not apply to line 40 because the search attributes in level 2 do not match the item and warehouse in line 40.

Appendix A

Glossary

A

address

A full set of addressing details, which include the postal address, access numbers for telephone, fax, and telex, e-mail and Internet address, identification for taxation purposes, and routing information.

allocation

The reservation of inventory against a demand prior to the outbound process.

You can allocate a quantity of inventory to a business partner or a particular demand order.

Note

The documentation sometimes states that a particular demand object, such as a sales order, is *allocated to* a business partner, order, or reference. That phrase actually means that ERP LN must fill the demand object with *supply that was allocated to* that particular business partner, order or reference.

business partner

A party with whom you carry out business transactions, for example, a customer or a supplier. You can also define departments within your organization that act as customers or suppliers to your own department as business partners.

The business partner definition includes:

- The organization's name and main address.
- The language and currency used.
- Taxation and legal identification data.

You address the business partner in the person of the business partner's contact. The business-partner status determines if you can carry out transactions. The transactions type (sales orders, invoices, payments, shipments) is defined by the business partner's role.

enterprise unit relationship

Identifies the relation between two enterprise units in a multisite organization.

internal business partner

A business partner that represents an enterprise unit of the same logistic company. The use of internal business partners allows you to model the goods flow between enterprise units and the corresponding financial relations, such as invoicing and pricing agreements. You must define all business partner roles for an internal business partner.

number group

A group of first free number series that you can assign to a specific use.

For example, you can assign a number group to:

- Business partner codes
- Purchase contracts
- Sales orders
- Production orders
- Service orders
- Warehousing orders
- Freight orders

Within a number group you can define multiple series. Each series is identified by the series code. The series numbers that ERP LN generates consist of the series code followed by the first free number in the series. Series codes of the same number group have the same length.

purchase contract

Purchase contracts are used to register specific agreements with a buy-from business partner that concern the delivery of specific goods.

A contract is comprised of:

- A purchase contract header with general business partner data, and optionally, a linked terms and conditions agreement.
 - One or more purchase contract lines with price/discount agreements and quantity information that apply to an item or price group.
-

sales contract

Sales contracts are used to register specific agreements with a sold-to business partner about the delivery of certain goods.

A contract is comprised of:

- A sales contract header with general business partner data, and optionally, a linked terms and conditions agreement.
- One or more sales contract lines with price/discount agreements and quantity information that apply to an item or price group.

series

A group of order numbers or document numbers starting with the same series code. The numbers consist of 9 characters.

Series identify orders with certain characteristics. For example, all sales orders handled by the large accounts department start with LA (LA0000001, LA0000002, LA0000003, and so on).

subcontracting

Allowing another company (the subcontractor) to carry out work on an item. This work can concern the entire production process, or only one or more operations in the production process.

terms and conditions agreement

An agreement between business partners about the sale, purchase, or transfer of goods, in which you can define detailed terms and conditions about orders, planning, logistics, invoicing, and allocation/hard pegging, and define the search mechanism to retrieve the correct terms and conditions.

The agreement includes the following:

- A header with the type of agreement and the business partner(s).
 - Search levels with a search priority and a selection of search attributes (fields) and linked terms and conditions groups.
 - One or more lines with the values for the search levels' search attributes.
 - Terms and conditions groups with detailed terms and conditions about orders, planning, logistics, invoicing, and allocation/hard pegging for the lines.
-

terms and conditions attribute set

A set that groups search attributes of the same terms and conditions type for use on the terms and conditions search levels.

Search attributes not linked to the attribute set cannot be entered on the terms and conditions agreement for the terms and conditions type.

terms and conditions group

Groups the detailed terms and conditions about orders, planning, logistics, invoicing, or allocation/hard pegging for the terms and conditions line.

terms and conditions line

Holds the values for the search attributes of a terms and conditions search level. Therefore, it specifies the fields to which the detailed terms and conditions, as stored in the terms and conditions groups, apply.

terms and conditions search attribute

An element (field) selected on the terms and conditions search level and specified and searched for on the terms and conditions line.

terms and conditions search level

A priority level for searching and selecting a terms and conditions line. Search levels include a selection of search attributes (fields) and linked terms and conditions groups.

terms and conditions template

A default terms and conditions agreement, representing a business process, with no business partner linked to it. The level of detail of the template data is user-definable.

Based on a template, you can do the following:

- Generate new terms and conditions agreements for business partners.
 - Update existing terms and conditions agreements.
 - Validate terms and conditions agreements.
-

terms and conditions type

Defines the type of terms and conditions agreement or template and is linked to a set of search attributes. Each terms and conditions type has its own search attributes.

The following terms and conditions types are available:

- **Purchase**
Purchase terms and conditions agreements can be linked to purchase contracts.
- **Sales**
Sales terms and conditions agreements can be linked to sales contracts.
- **Internal**
Internal terms and conditions agreements can be linked to enterprise unit relationships.

vendor managed inventory (VMI)

Vendor managed inventory is an inventory management method according to which the supplier usually manages the inventory of his customer or subcontractor. Sometimes, the supplier manages the supply planning as well. Alternatively, the customer manages the inventory but the supplier is responsible for supply planning. Inventory management or inventory planning can also be subcontracted to a logistics service provider (LSP).

The supplier or the customer may own the inventory delivered by the supplier. Often, the ownership of the inventory changes from the supplier to the customer when the customer consumes the inventory, but other ownership transfer moments occur, which are laid down by contract.

Vendor-managed inventory reduces internal costs associated with planning and procuring materials and enables the vendor to better manage his inventory through higher visibility to the supply chain.

warehouse

A place for storing goods. For each warehouse, you can enter address data and data relating to its type.

warehouse set

A group of warehouses with similar characteristics. A warehouse can belong to one particular warehouse set.

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