

Sales Order-- Expense - fixed price (project)

Prerequisite to do Project Based Service/Product:

Edit Project Scope>Questions> Sales>Sell Project-Based Products and Services>Check question "You can sell project-based services." And "You use sales orders to sell projects."

## 1. Release the Sales Order

If you input the project based service in the Sales Order and you want to release the Sales Order directly, error message "Order not released; No project task is assigned to item 10" will be displayed.

This is because a project based item has to have a project assigned to it.

## 2. Create Project

Input necessary information to create a project related to Sales Order.

## New Project

Project Structure:*	One Task for Each Item
Person Responsible:*	E0005
Responsible Unit:*	P1110
Copy Revenue:	<input type="checkbox"/>
Duration:	1 Day(s)

After creating the Project, you can release Sales Order without any errors.

### New Sales Order

Submit Save Close Create with Reference Create Project Check Credit Limit You Can Also

Release Order Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

Send Order Confirmation to Account

The order is sent for approval and after approval the order is released for further processing. The status of the order changes from In Preparation to Open, you can no longer delete items, or change the account. ATP results become binding.

Description	Contract Item	Quantity	List Price	Discount (%)
(project)	Carol_Exp	1 h	100,00 EUR	100

#### Details: Item Carol\_Expense\_fixed price (project)

Details Taxes Notes Attachments

Item

Service Status:

Delivery Status: Not Started

Invoice Status: Not Started

Item Type: Expense - fixed price (project)

Description: Carol\_Expense\_fixed price (project)

Posting Date: 21.12.2017

Project CPSO188 (3744) has been created. You can edit it as soon as you have saved the sales order.

The Status of Sales Order changed to open while other status on item level remains Not Started.

With Project Status as "In Planning".

### Sales Order: 3744

Status: **Open** Account: Carol Holdings External Reference: Project: CPSO188 - 3744 Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR Total: 124,00 EUR

Submit Save Close Preview New Copy Follow-Up Create Project Check Credit Limit You Can Also

General Items Pricing and Invoicing Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

#### Document Flow

Show: Standard View 100% Refresh Return to Initial View Hide Details Search

**Sales Order**  
3744  
Status: Open  
Created On: 21.12.2017

**Project**  
CPSO188  
Status: In Planning  
Created On: 21.12.2017

### 3. Release related project

**Maintain Project: 3744**

3744  
CPSO188 Status: **Released** On Hold: No Start Date: 21.12.2017 Finish Date: 21.12.2017

Save Close New Valuate Download You can also

**Project Plan** Team and Staffing Products Sales Tracking Project Overview Feed

Gantt Chart Work Breakdown Structure Network Diagram

Basic Data Work Materials Expenses Revenues Scheduling Checklists Accounting Dependencies Attachments

Project Task ID:	CPSO188-1	Status:	Released
Project Task Name:	Carol_Expense_fixed price (project)	Completion Date:	
Duration:	1 Day(s)	On Hold:	<input type="checkbox"/>
Project Task Type:	Task	Estimated PoC:	0%
Person Responsible:	Sandra Mohr	Priority:	
Time Recording:	No Approval Required	Risk:	
Work Description:	No Work Description Required	Mail Notification:	<input type="checkbox"/>

Description Risk Comment

Back to the respective Sales Order.

Releasing assigned project won't affect Sales Order's header status as well as on item level.

**Sales Order: 3744**

Status: **Open** Account: Carol Holdings External Reference: Project: CPSO188 - 3744 Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR Total: 124,00 EUR

Submit Save Close Preview New Copy Follow-Up Create Project Check Credit Limit You Can Also

General **Items** Pricing and Invoicing Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

**Details: Item Carol\_Expense\_fixed price (project)**

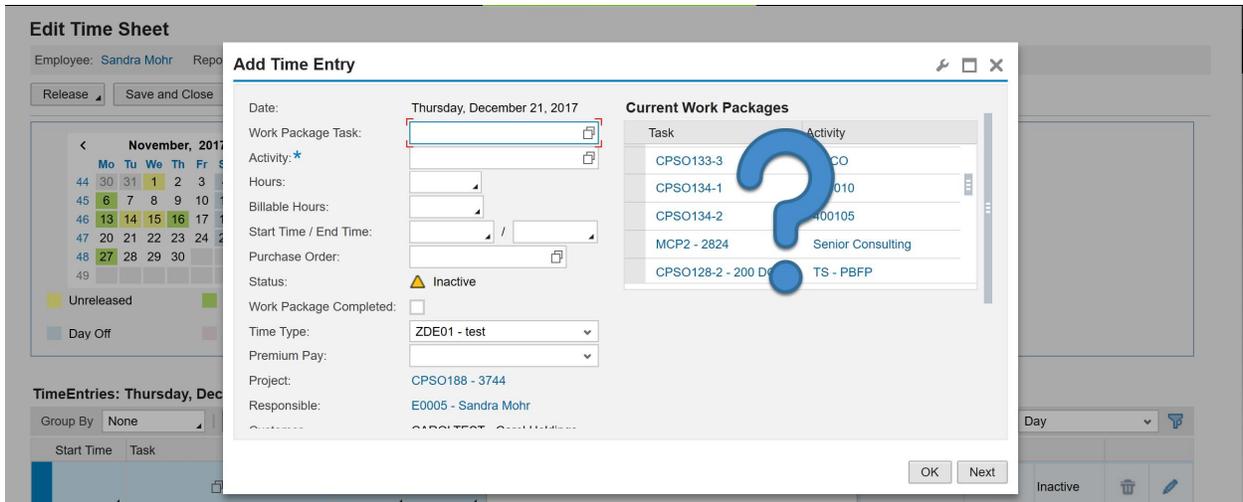
Details Taxes Notes Attachments

**Item**

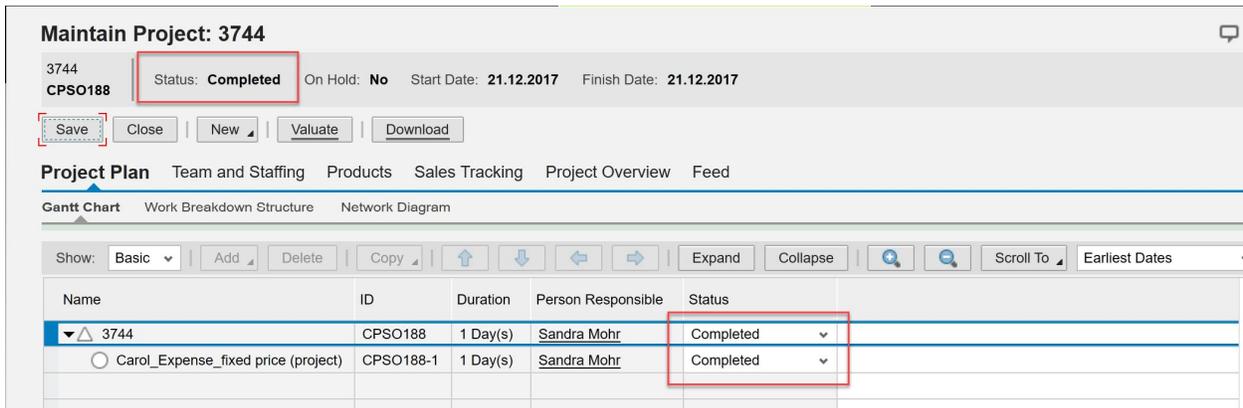
Service Status:	Not Started
Delivery Status:	Not Started
Invoice Status:	Not Started
Item Type:	Expense - fixed price (project)
Description:	Carol_Expense_fixed price (project)
Posting Date:	21.12.2017
Requested Date:	26.12.2017 00:00 UK
Reason for Rejection:	
Exchange:	
Exchange/NetAmount:	
Exchange/Price/NetPrice/Amount:	
Alaa:	
Process Type:	Sales Order

Note : Since this item type is Expense - fixed price (project), Neither Service Confirmation no time recording is needed via the project.

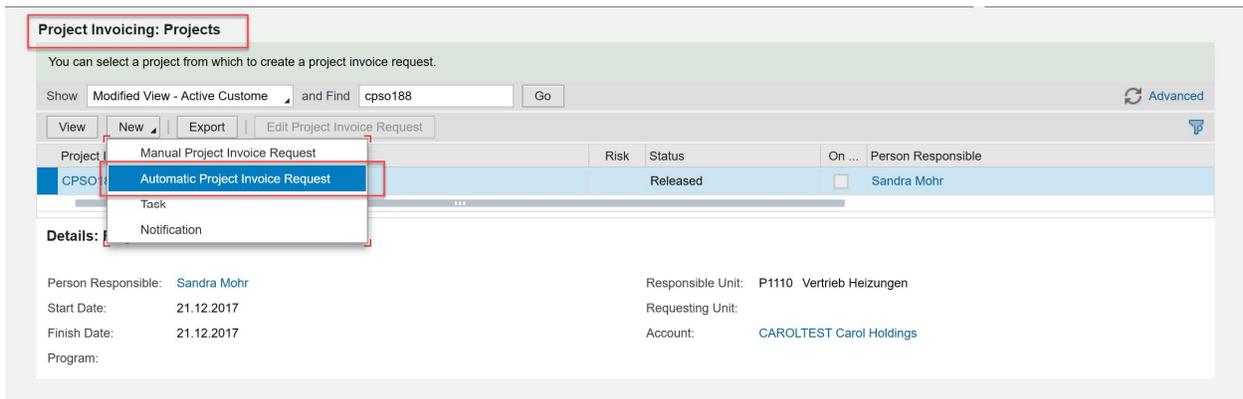
Expense related item is not available in Time Recording.



#### 4. Complete Related Project.



#### 5. Generate Project Invoice Request via Customer Invoicing WoC> Project Invoicing> Projects



#### 6. Release Project Invoice Request and Invoice the Invoice Request.

**Invoice Requests**

You can process all invoice requests that are ready for invoicing. The invoice requests can originate from predecessor documents or can be created manually.

Show **Today's Invoice Requests** and Find   Advanced

Group By **None**

Status	Document ID	Invoice Request Type	Extern...	Account	Invoic...	Net Value	Total
To Be Invoiced	432	Customer Project Invoice Request		Carol Holdings	21.12....	100,00 EUR	124,00 EUR

**Details: Customer Project Invoice Request 432**

Line	Status	Docu...	Product ID	Description	Quantity	List Price	Discou...	Net Price	Net Value	Invoic...
100	To Be Invoiced	Sales ...	CAROL_PXFX1	Carol_Expense_fixed price (project)	1 h	100,00 EUR		100,00 EUR	100,00 EUR	21.12....

7. Back to the respective Sales Order.

The Status of Sales Order changed to In Process.

The Delivery Status changed to Finished after completing the project.

The Invoice Status changed to In Process.

**Sales Order: 3744**

Status: **In Process** Account: Carol Holdings External Reference: Project: CPSO188 - 3744 Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR Total: 124,00 EUR

General **Items** Pricing and Invoicing Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

**Details: Item Carol\_Expense\_fixed price (project)**

**Item**

Service Status: **In Process**  
 Delivery Status: Finished / 1 Hour(s)  
 Invoice Status: In Process

Item Type: Expense - fixed price (project)  
 Description: Carol\_Expense\_fixed price (project)  
 Posting Date: 21.12.2017  
 Requested Date: 26.12.2017 00:00 UK  
 Reason for Rejection:  
 Exchange:

**Service**

Fulfillment: Internal  
 Invoice Date: 21.12.2017

8. To make the invoice status to finished, you have to manually finish the invoicing in the project invoice> Sales Orders> Change Status> Finish Invoicing.

**Project Invoicing: Sales Orders**

You can select a sales order from which to create a project invoice request.

Show **Open Sales Orders** and Find   Advanced

Group By **None**

Invoice Status	Sales Order ID	Account	Last Invoiced On	Project ID	Project Name	Description
In Process	3744	Carol Holdings	21.12.2017	CPSO188	3744	

Back to the respective Sales Order.

The Status of Sales Order changed to Completed as well as on item level.

**Sales Order: 3744**



Status: **Completed** Account: Carol Holdings External Reference: Project: CPSO188 - 3744 Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR  
Total: 124,00 EUR

Submit Save Close Preview New Copy Follow-Up Create Project Check Credit Limit You C

General **Items** Pricing and Invoicing Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

Details Taxes Notes Attachments

**Item**

Service Status:  
Delivery Status: Finished / 1 Hour(s)  
Invoice Status: Finished

Item Type: Expense - fixed price (project)  
Description: Carol\_Expense\_fixed price (project)  
Posting Date: 21.12.2017  
Requested Date: 26.12.2017 00:00 UK  
Reason for Rejection:  
Exchange:  
Exchange/NetAmount:

**Service**

Fulfillment: Internal  
Invoice Date: 21.12.2017