

Sales Order -- Expense - fixed price without actuals

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Pre-requisite to do Service item with Expense type in Sales Order.

Edit Project Scope>Questions> Sales> Sell Services> Check question:

Do you intend to invoice expenses based on receipts, that result from selling services, directly from the sales order using a fixed price?

The screenshot shows the 'Questions for Sell Services' configuration screen in SAP. The '4 Questions' step is highlighted in the top navigation bar. On the left, the 'Scoping Element' tree shows 'Sales' > 'Product and Service Portfolio for Sales' > 'Sell Services' selected. The main area displays three groups of questions, all marked as 'Reviewed' with a checkmark in the 'In Scope' column:

- Group: Expense Types for Sales (2)**
  - Do you intend to invoice expenses based on receipts, that result from selling services, directly from the sales order using a fixed price? (Reviewed, In Scope)
  - Do you intend to invoice expenses based on receipts that result from sales or services, taking actual costs from the service confirmation? (Reviewed, In Scope)
- Group: Service Types for Sales with Tracking Actuals (2)**
  - Do you sell or provide services for a fixed price, but track the actual time and materials needed for reporting purposes? (Reviewed, In Scope)
  - Do you sell services for a price based on the actual time and material needed? (Reviewed, In Scope)
- Group: Service Types for Sales without Tracking Actuals (1)**
  - Do you sell or provide services for a fixed price, but do not track the actual time and materials needed? (Reviewed, In Scope)

## Without Service Confirmation:

1. Release Sales Order

The Status of Sales Order changed to Open.

The screenshot shows the 'Sales Order: 3722' details screen. The 'Status' is 'Open'. The 'Details' tab is active, showing the following information:

**Item Details:**

- Service Status: Not Released
- Delivery Status: Not Started
- Invoice Status: Not Started
- Item Type: Expense - fixed price without actuals
- Description: Carol\_Exp\_fixed price without actuals
- Posting Date: 18.12.2017
- Requested Date: 23.12.2017
- Reason for Rejection:
- Exchange:
- Exchange/NetAmount:

**Service Details:**

- Fulfillment: Internal
- Service Performer: Sandra Mohr
- Supplier:

2. Release to Service Execution.

The Status of Sales Order changed to In Process.

Service Status changed to Released.

**Sales Order: 3722**

Status: **In Process** Account: Carol Holdings External Reference: 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

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

**Details: Item Carol\_Exp\_fixed price without actuals**

Details Taxes Notes Attachments

**Item**

Service Status: Released

Delivery Status: Not Started

Invoice Status: Not Started

Item Type: Expense - fixed price without actuals

Description: Carol\_Exp\_fixed price without actuals

Posting Date: 18.12.2017

Requested Date: 23.12.2017 00:00 UK

Reason for Rejection:

Exchange:

Exchange/NetAmount:

Exchange/Price/NetPrice/Amount:

Alaa:

Process Type: Sales Order

**Service**

Fulfillment: Internal

Service Performer: Sandra Mohr

Supplier:

### 3. Complete Service Execution

The Delivery Status changed to Finished.

Due to the item type-- Expense - fixed price without actuals, you can skip the Service Confirmation step since system won't consider actuals into Sales Order and invoice value will be fetched directly from Sales Order.

**Sales Order: 3722**

Status: **In Process** Account: Carol Holdings External Reference: 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

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

**Details: Item Carol\_Exp\_fixed price without actuals**

Details Taxes Notes Attachments

**Item**

Service Status: Released

Delivery Status: Finished / 1 Each

Invoice Status: Not Started

Item Type: Expense - fixed price without actuals

Description: Carol\_Exp\_fixed price without actuals

Posting Date: 18.12.2017

Requested Date: 23.12.2017 00:00 UK

Reason for Rejection:

Exchange:

Exchange/NetAmount:

Exchange/Price/NetPrice/Amount:

**Service**

Fulfillment: Internal

Service Performer: Sandra Mohr

Supplier:

### 4. Invoice Sales Order Invoice Request

Group By	None	Edit	New	Preview	Export	Invoice	Invoice - Advanced	Check	
Status	Document ID	Invoice Request Type	Extern...	Account	Invoic...	Net Value	Total	Cancellation Status	
To Be Invoiced	3722	Sales Order Invoice Request		Carol H...	18.12...	100,00 EUR	124,00 EUR	Not Canceled	

**Details: Sales Order Invoice Request 3722**

Line	Status	Product ID	Description	Quantity	List Price
10	To Be Invoiced	CAROL_XFIX	Carol_Exp_fixed price without act...	1 ea	100,00 EUR

Back to the respective Sales Order

You can see Sales Order in Completed Status as well as on Item level.

**Sales Order: 3722**

Status: **Completed** Account: Carol Holdings External Reference: 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

**Item**

Service Status: Released  
 Delivery Status: Finished / 1 Each  
 Invoice Status: Finished

Item Type: Expense - fixed price without actuals  
 Description: Carol\_Exp\_fixed price without actuals  
 Posting Date: 18.12.2017  
 Requested Date: 23.12.2017 00:00 UK  
 Reason for Rejection:  
 Exchange:

**Service**

Fulfillment: Internal  
 Service Performer: Sandra Mohr  
 Invoice Date: 18.12.2017  
 Supplier:

## With Service Confirmation:

### 1. Release Sales Order

The Status of Sales Order changed to Open after releasing order.

**Sales Order: 3721**

Status: **Open** Account: Carol Holdings External Reference: 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

Line	ATP	Product	Description	Contract Item	Quantity	List Price	Discount (%)
10		CAROL_XFIX - Carol_Exp_fixed price without actuals	Carol_Exp		1 ea	100,00 EUR	100

**Details: Item Carol\_Exp\_fixed price without actuals**

Details Taxes Notes Attachments

**Item**

Service Status: Not Released  
 Delivery Status: Not Started  
 Invoice Status: Not Started

Item Type: Expense - fixed price without actuals  
 Description: Carol\_Exp\_fixed price without actuals  
 Posting Date: 18.12.2017  
 Requested Date: 23.12.2017 00:00 UK  
 Reason for Rejection:

**Service**

Fulfillment: Internal  
 Service Performer: Sandra Mohr  
 Supplier:

### 2. Release to Service Execution.

The Status of Sales Order changed to In Process.

Service Status changed to Released.

**Sales Order: 3721**

Status: **Open** Account: **Carol Holdings** External Reference: 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

Release Order  
Send Order Confirmation to Account  
**Release to Service Execution**

Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

Submits all service items to the order pipeline for service execution, and releases the order if this has not already been done. The action also exists on item level.

Item

Service Status: Not Released  
Delivery Status: Not Started  
Invoice Status: Not Started  
Item Type: Expense - fixed price without actuals  
Description: Carol\_Exp\_fixed price without actuals  
Posting Date: 18.12.2017  
Requested Date: 23.12.2017 00:00 UK  
Reason for Rejection:  
Exchange:  
Exchange/NetAmount:  
Exchange/Price/NetPrice/Amount:

**Service**  
Fulfillment: Internal  
Service Performer: Sandra Mohr  
Supplier:

**Sales Order: 3721**

Status: **In Process** Account: **Carol Holdings** External Reference: 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

Add Row Remove Check Availability Assign Source of Supply Replace Product Release Execution **Complete Execution** Fast Entry Renumber >>

Line	ATP	Product	Description	Contract Item	Quantity	List Price	Discount (%)
10		CAROL_XFIX - Carol_Exp_fixed price without actuals	Carol_Exp.		1 ea	100,00 EUR	100

**Details: Item Carol\_Exp\_fixed price without actuals**

Details Taxes Notes Attachments

Item

Service Status: **Released**  
Delivery Status: Not Started  
Invoice Status: Not Started  
Item Type: Expense - fixed price without actuals  
Description: Carol\_Exp\_fixed price without actuals  
Posting Date: 18.12.2017  
Requested Date: 23.12.2017 00:00 UK

**Service**  
Fulfillment: Internal  
Service Performer: Sandra Mohr

### 3. Complete Service Execution

The Delivery Status changed to Finished.

**Sales Order: 3721**

Status: **In Process** Account: Carol Holdings External Reference: 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\_Exp\_fixed price without actuals**

Details Taxes Notes Attachments

**Item**

Service Status: Released  
 Delivery Status: Finished / 1 Each  
 Invoice Status: Not Started

Item Type: Expense - fixed price without actuals  
 Description: Carol\_Exp\_fixed price without actuals  
 Posting Date: 18.12.2017  
 Requested Date: 23.12.2017 00:00 UK  
 Reason for Rejection:  
 Exchange:  
 Exchange/NetAmount:  
 Exchange/Price/NetPrice/Amount:  
 Alaa:  
 Process Type: Sales Order

**Service**

Fulfillment: Internal  
 Service Performer: Sandra Mohr  
 Supplier:

Due to the item type-- Expense - fixed price without actuals, you can skip the Service Confirmation step since system won't consider actuals into Sales Order and invoice value will be fetched directly from Sales Order.

While the Confirm Service Execution tab is still available under the Submit dropdown list.

You can attach Service Confirmation to Sales Order per business needs.

**Sales Order: 3721**

Status: **In Process** Account: Carol Holdings External Reference: 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

Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

**without actuals**

Details Taxes Notes Attachments

**Item**

Service Status: Released  
 Delivery Status: Finished / 1 Each  
 Invoice Status: Not Started

Item Type: Expense - fixed price without actuals  
 Description: Carol\_Exp\_fixed price without actuals  
 Posting Date: 18.12.2017  
 Requested Date: 23.12.2017 00:00 UK  
 Reason for Rejection:  
 Exchange:  
 Exchange/NetAmount:  
 Exchange/Price/NetPrice/Amount:  
 Alaa:  
 Process Type: Sales Order

**Service**

Fulfillment: Internal  
 Service Performer: Sandra Mohr  
 Supplier:

**Submit** dropdown menu:

- Release Order
- Send Order Confirmation to Account
- Release to Service Execution
- Confirm Service Execution**
- Delete Service Execution

**Confirm Service Execution** tooltip:

Creates a new service confirmation after the service has been performed. The action is only relevant for released service and expense items requiring a confirmation.

#### 4. Confirm Service Execution

NO item details will be passed from Sales Order since this is XFIX item type.

**New Service Confirmation**

Release Save Close

Executed By:

Service Performer:

Arrived On:

Fixed On:

**Services and Spare Parts**

To confirm a service, click Release. Then choose With Order Completion if the service or parts consumption is finished (no further confirmations are allowed and the related order item is completed). Alternatively, choose Without Order Completion if the service or parts consumption is not finalized (further confirmations are allowed and the related order item remains in process).

Add Row Remove Release

Line	Status	Product	Description	Coverage	Quantity	Actual Duration	Reference Sales Order/Item	List Price

Total Item Net Value:

Overall Discount (%):

Here I entered actual duration *LARGER* than original one in Service Confirmation.

**New Service Confirmation**

Release Save Close

General **Services and Spare Parts** Pricing and Invoicing Involved Parties Document Flow Changes Attachments Output History

**Services and Spare Parts**

To confirm a service, click Release. Then choose With Order Completion if the service or parts consumption is finished (no further confirmations are allowed and the related order item is completed). Alternatively, choose Without Order Completion if the service or parts consumption is not finalized (further confirmations are allowed and the related order item remains in process).

Add Row Remove Split Part(s) Quantity Release

Line	Status	Product	Description	Cover...	Quantity	Actual Du...	Net Value	Reference Sales Order/Item
10	Not Started	CAROL_XFIX - Carol_Exp_fixed price withi	Carol_Exp_fixed price without actuals		2 ea		200,00 EUI	

**Details: Carol\_Exp\_fixed price without actuals**

General Time Reporting Taxes Notes

**Service/Spare Part**

Product ID: CAROL\_XFIX

Description: Carol\_Exp\_fixed price without actuals

Reference Sales Order/Item: /

**Status Information**

Status: Not Started

Invoicing Status: Not Started

Cancellation Status: Not Canceled

Back to the respective Sales Order> Document Flow

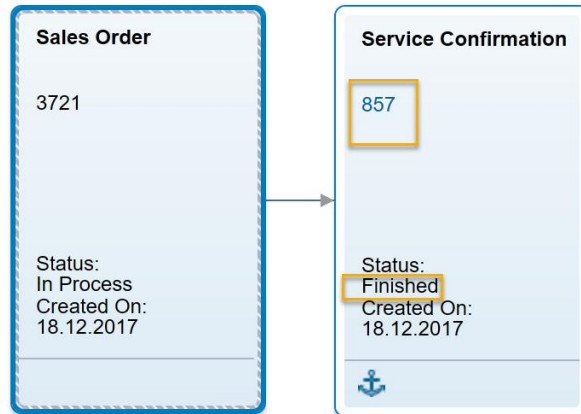
## Sales Order: 3721

Status: **In Process** Account: [Carol Holdings](#) External Reference: Employee Responsible: [Robert Mann](#) Net Value w

[Submit](#) [Save](#) [Close](#) | [Preview](#) | [New](#) [Copy](#) [Follow-Up](#) [Create Project](#) [Check Credit L](#)

[General](#) [Items](#) [Pricing and Invoicing](#) [Involved Parties](#) **Document Flow** [Changes](#) [Attachments](#) [A](#)

Show: [Standard View](#) [100%](#) [Refresh](#) [Return to Initial View](#)



If you go to Customer Invoice WoC> Invoice Request, you will find other than Sales Order's invoice request, there is one more invoice request for Service Confirmation with the value you've input in Service Confirmation.

Status	Document ID	Invoice Request Type	Extern...	Account	Invoic...	Net Value	Total	Cancellation Statu
To Be Invoiced	857	Service Confirmation Invoice Request		Carol Ho...	18.12....	200,00 EUR	248,00 EUR	Not Canceled

5. ONLY Invoice Sales Order.



**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 **Modified View - Today's Invoice** and Find  Go Advanced

Group By **None** | Edit | New | Preview | Export | **Invoice** | Invoice - Advanced | Check Filter

Status	Document ID	Invoice Request Type	External Reference	Account	Invoice Date	Net
To Be Invoiced	3721	Sales Order Invoice Request		Carol Holdings	18.12.2017	100,00

**Details: Sales Order Invoice Request 3721**

Line	Status	Product ID	Description	Quantity	List Price
10	To Be Invoiced	CAROL_XFIX	Carol_Exp_fixed price without act...	1 ea	100,00 EUR

Back to the Respective Sales Order.

Sales Order has been completed with all steps Finished.

**Sales Order: 3721** Print Share Star Refresh Close

Status: **Completed** | Account: Carol Holdings | External Reference: | 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\_Exp\_fixed price without actuals**

Details | Taxes | Notes | Attachments

**Item**

Service Status:	Released
Delivery Status:	Finished / 1 Each
Invoice Status:	Finished

Item Type:	Expense - fixed price without actuals
Description:	Carol_Exp_fixed price without actuals
Posting Date:	18.12.2017
Requested Date:	23.12.2017 00:00 UK
Reason for Rejection:	
Exchange:	
Exchange/NetAmount:	
Exchange/Price/NetPrice/Amount:	
Alaa:	

**Service**

Fulfillment:	Internal
Service Performer:	Sandra Mohr
Invoice Date:	18.12.2017
Supplier:	

NOTE:

1. Invoicing Service Confirmation or not won't affect Sales Orders' Completion.

