Sales Order -- Expense - fixed price without actuals

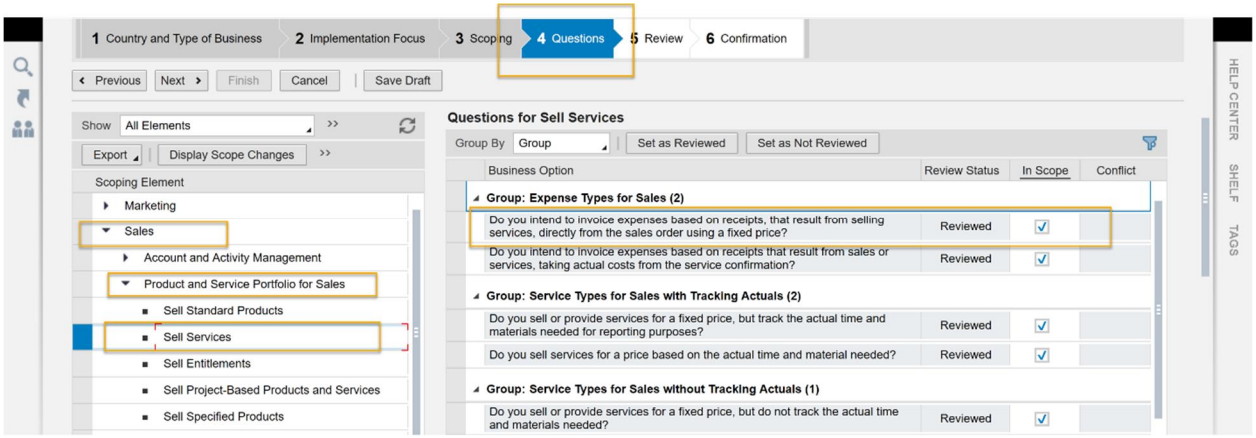
Contents

Without Service Confirmation: 2
With Service Confirmation: 4

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

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

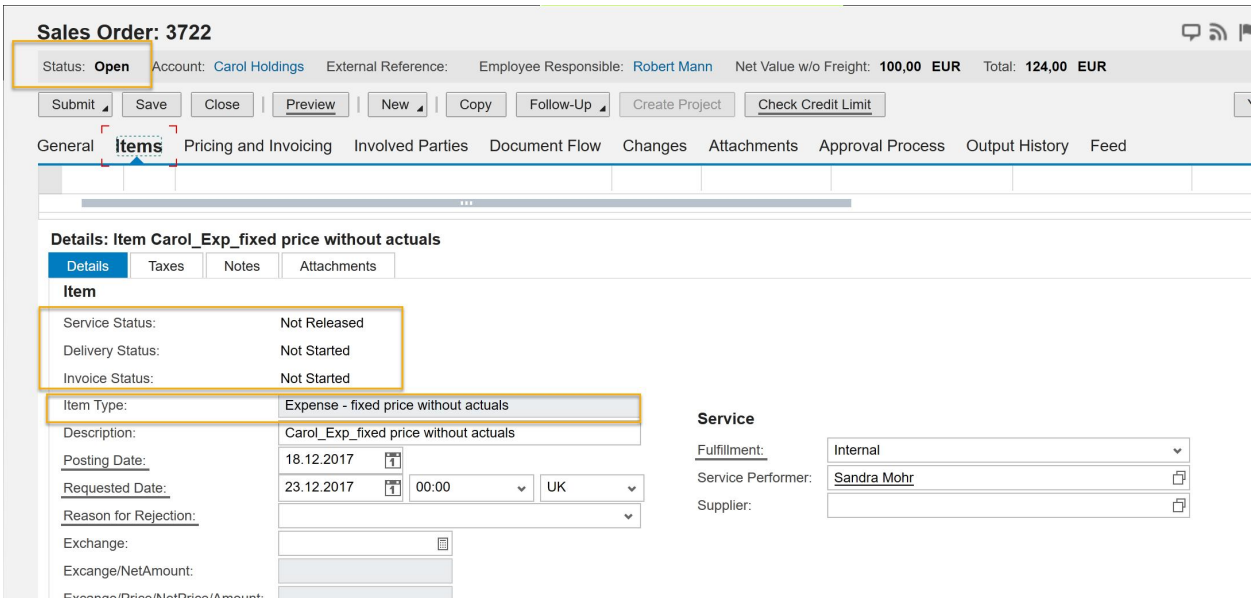
Do you intend to invoice expenses based on receipts, that result from selling services, directly from the sales order using a fixed price?



Without Service Confirmation:

1. Release Sales Order

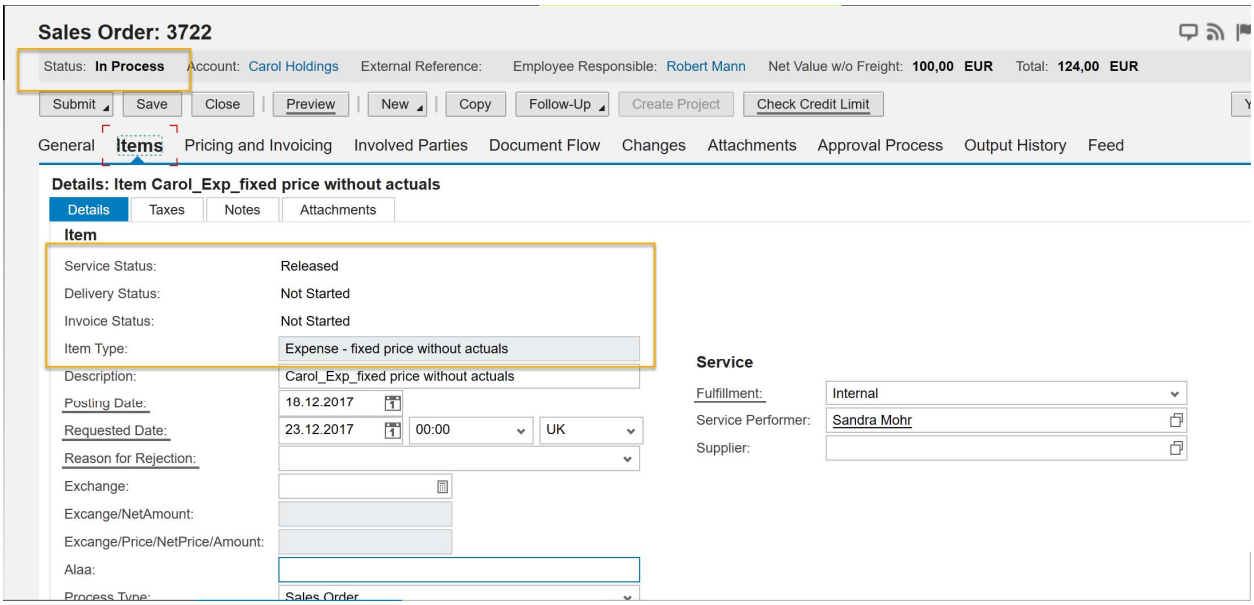
The Status of Sales Order changed to Open.



2. Release to Service Execution.

The Status of Sales Order changed to In Process.

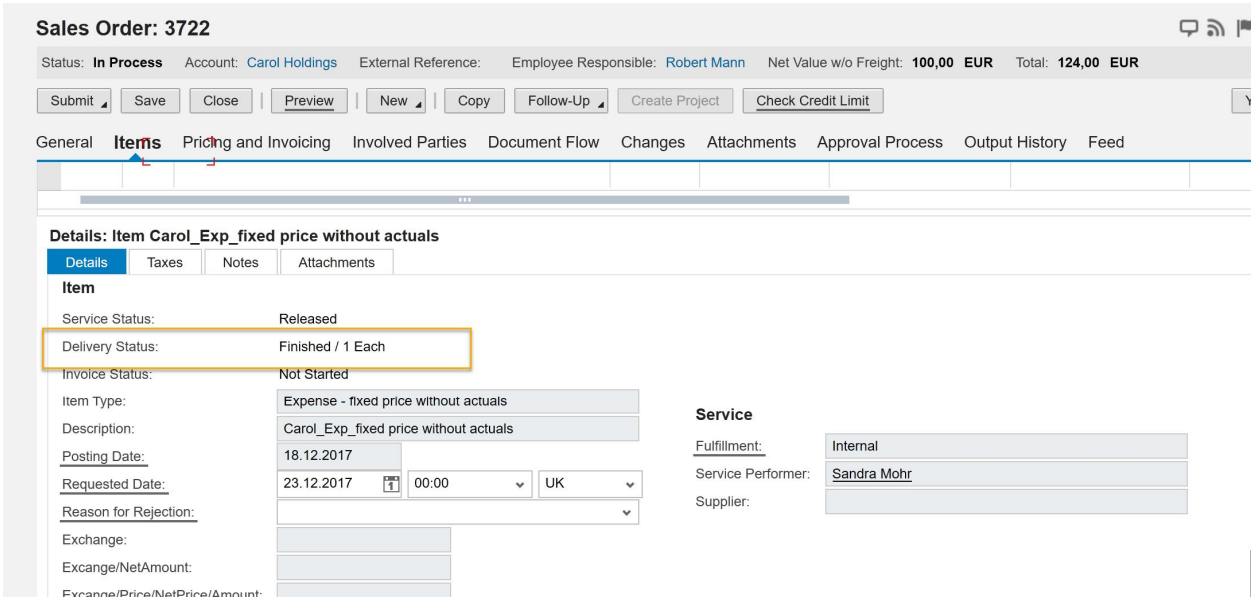
Service Status changed to Released.



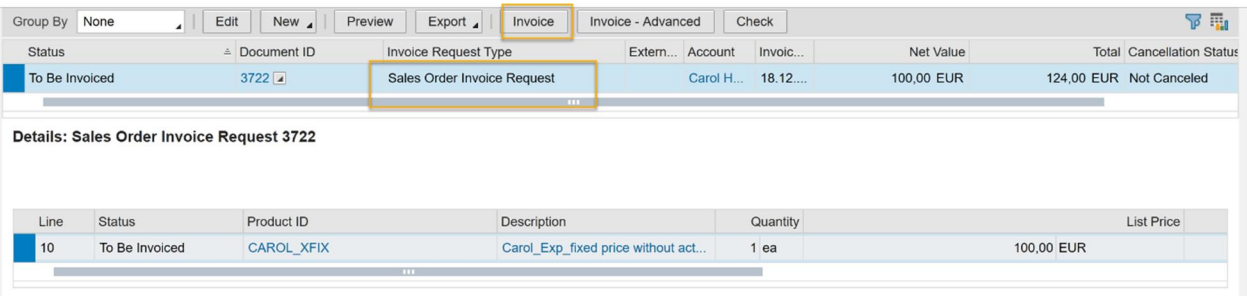
3. Complete Service Execution

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.

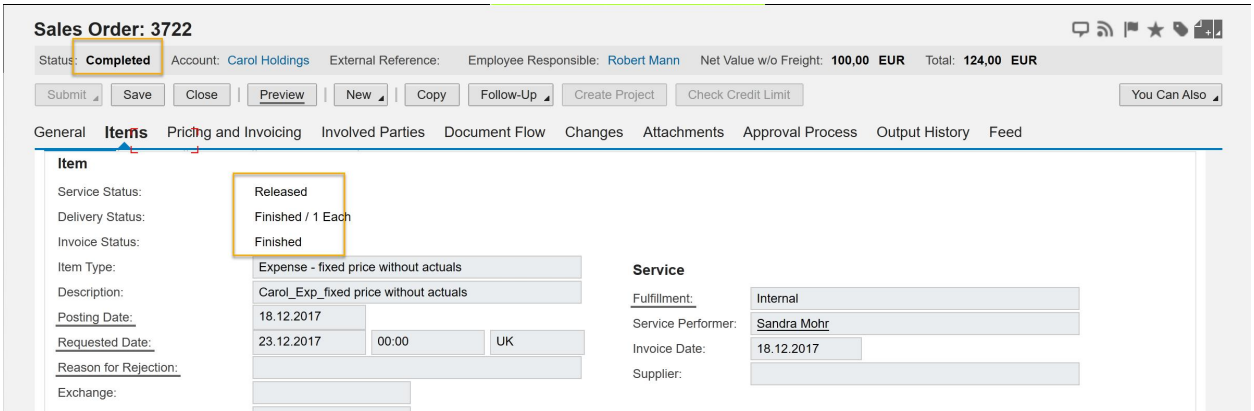


4. Invoice Sales Order Invoice Request



Back to the respective Sales Order

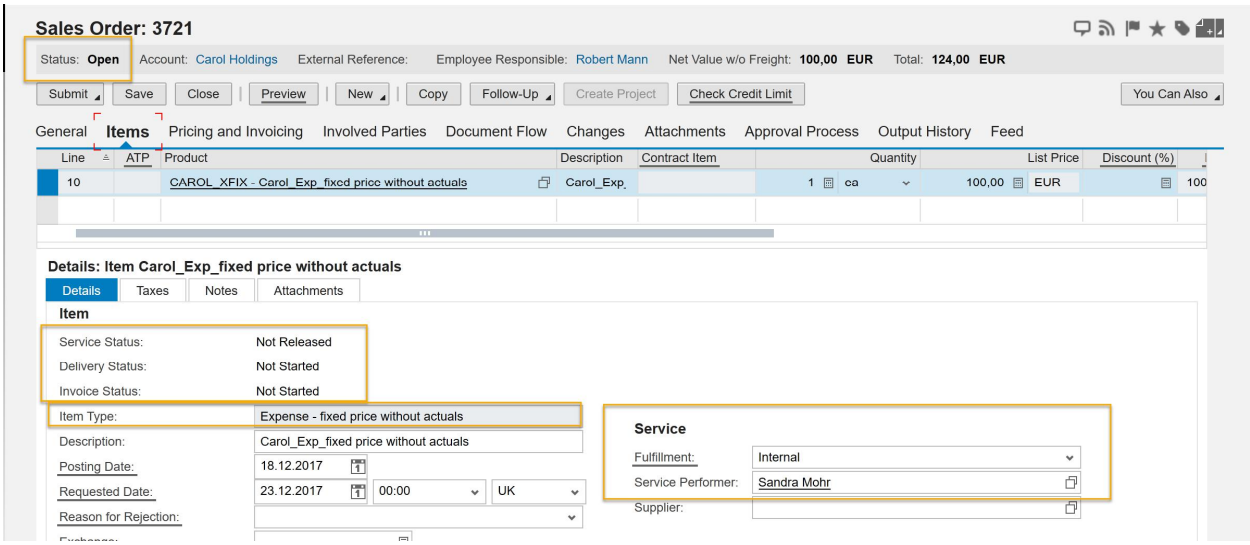
You can see Sales Order in Completed Status as well as on Item level.



With Service Confirmation:

1. Release Sales Order

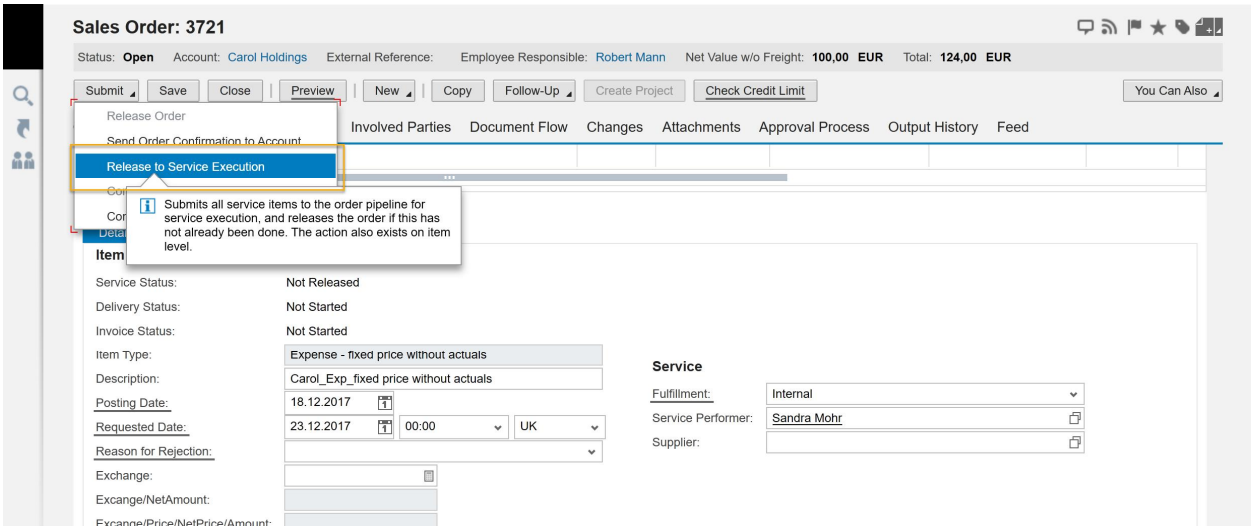
The Status of Sales Order changed to Open after releasing order.

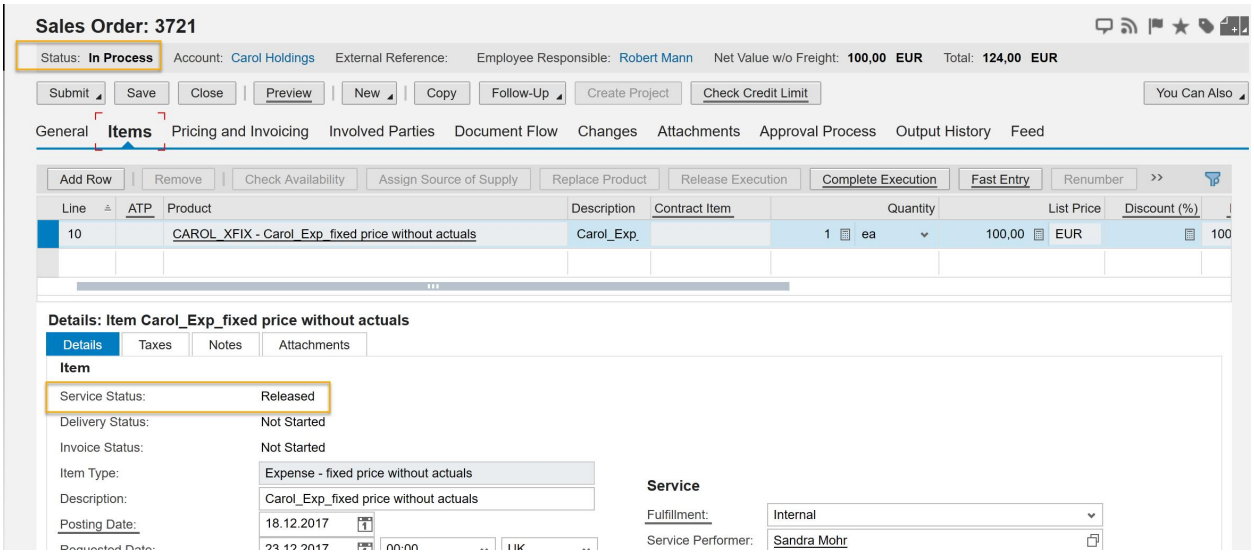


2. Release to Service Execution.

The Status of Sales Order changed to In Process.

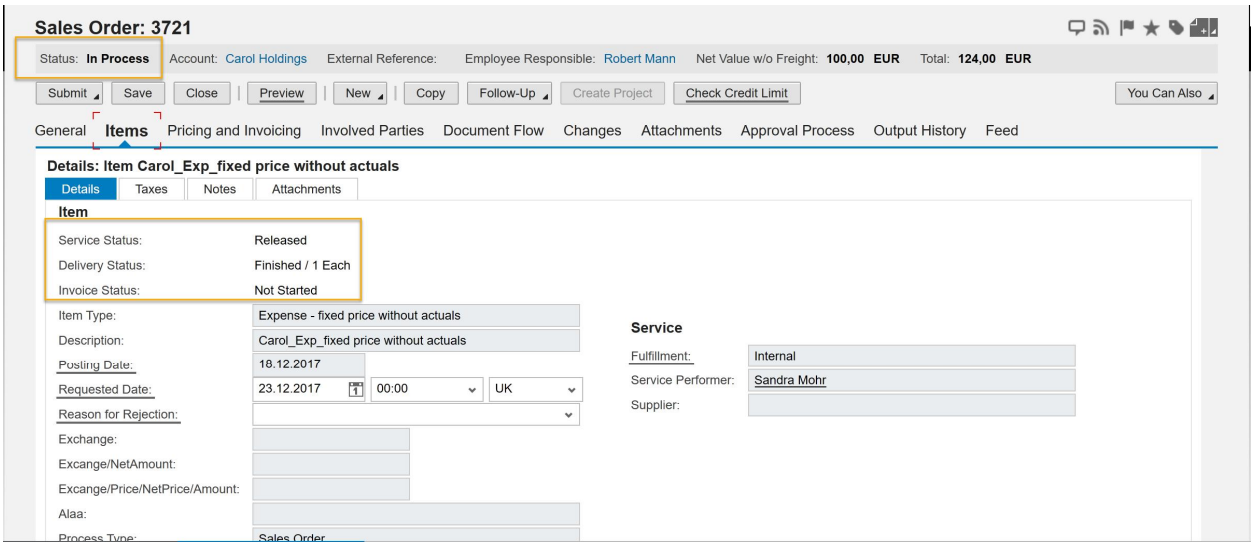
Service Status changed to Released.





3. Complete Service Execution

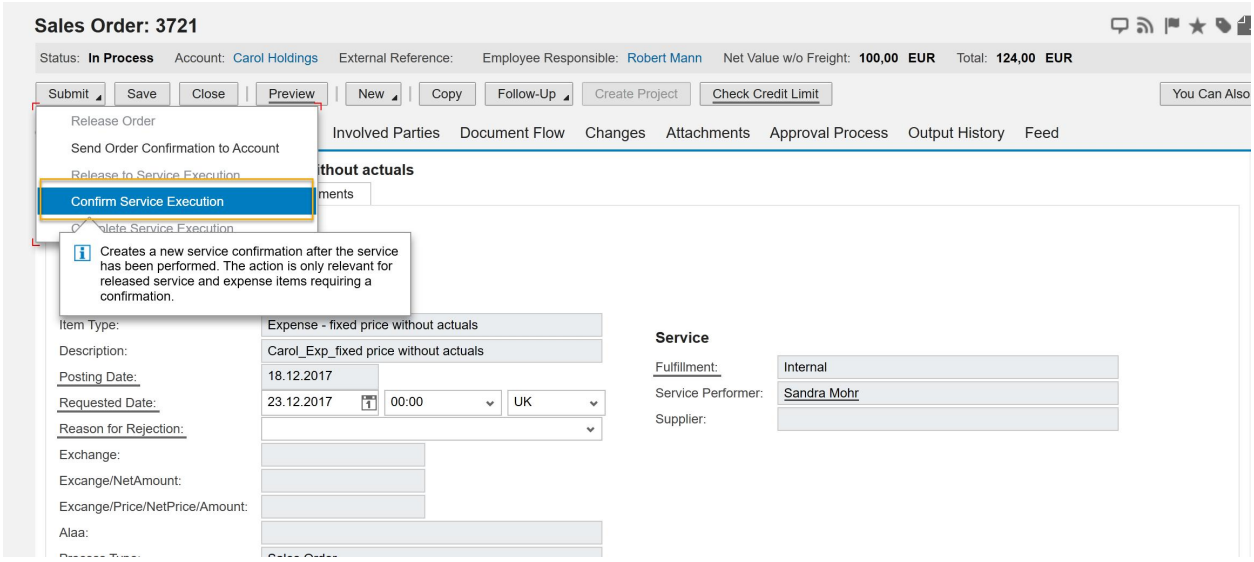
The Delivery Status changed to Finished.



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.

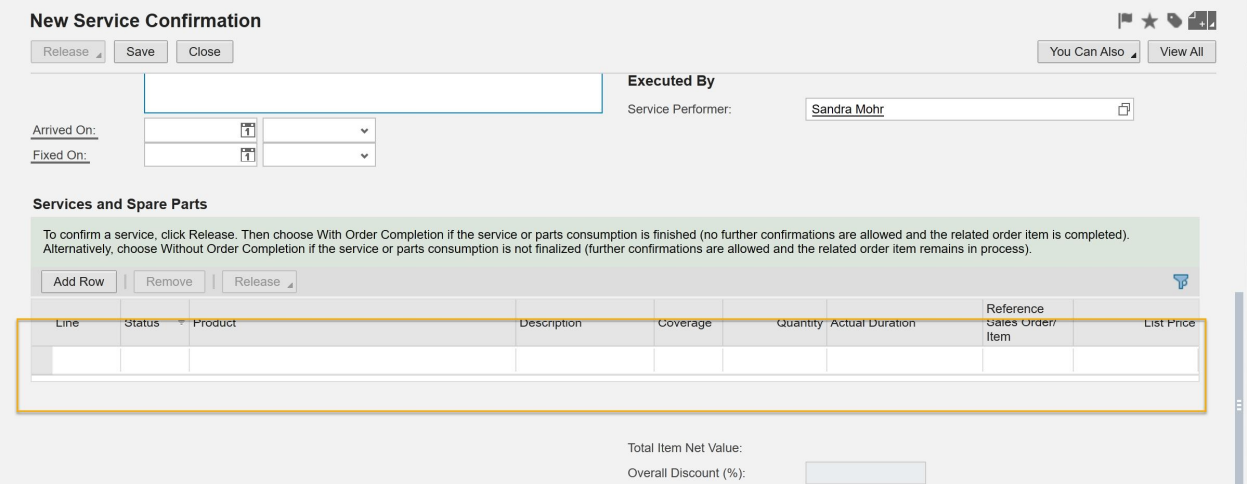
While the Confirm Service Execution tab is still available under the Submit dropdown list.

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

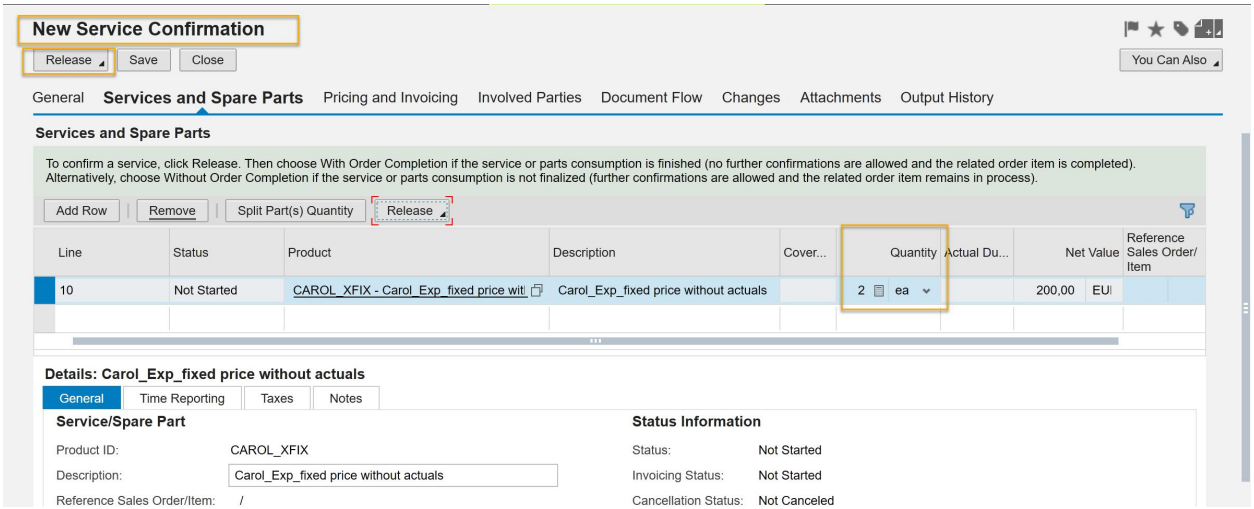


4. Confirm Service Execution

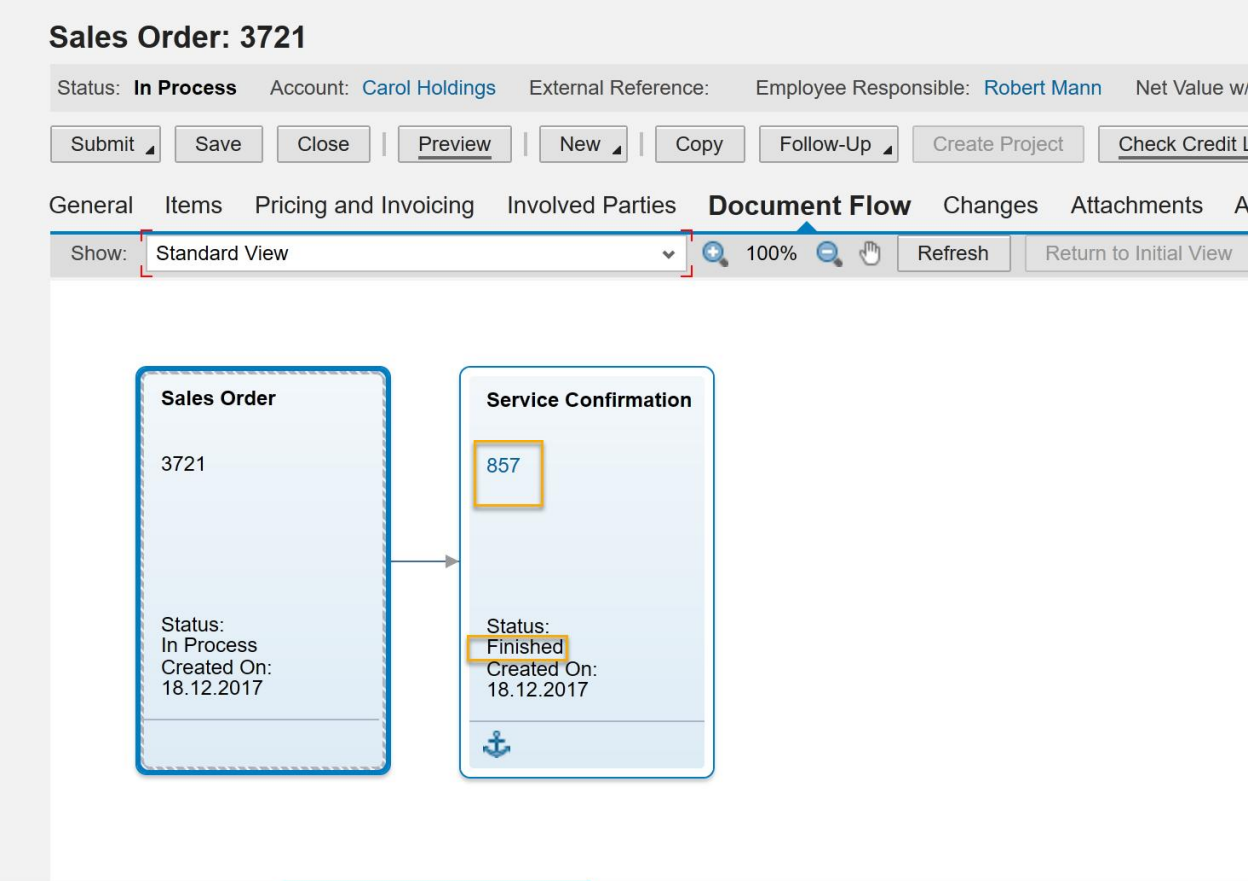
NO item details will be passed from Sales Order since this is XFIX item type.



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

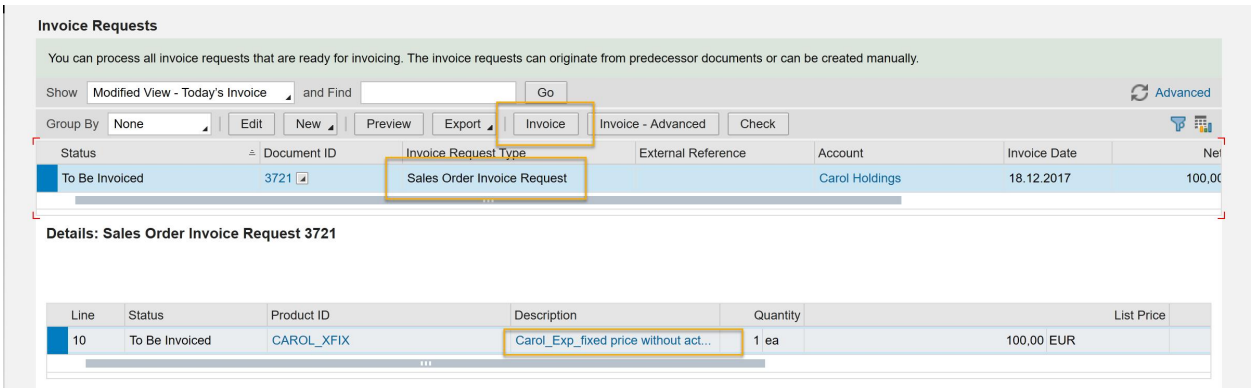


Back to the respective Sales Order> Document Flow



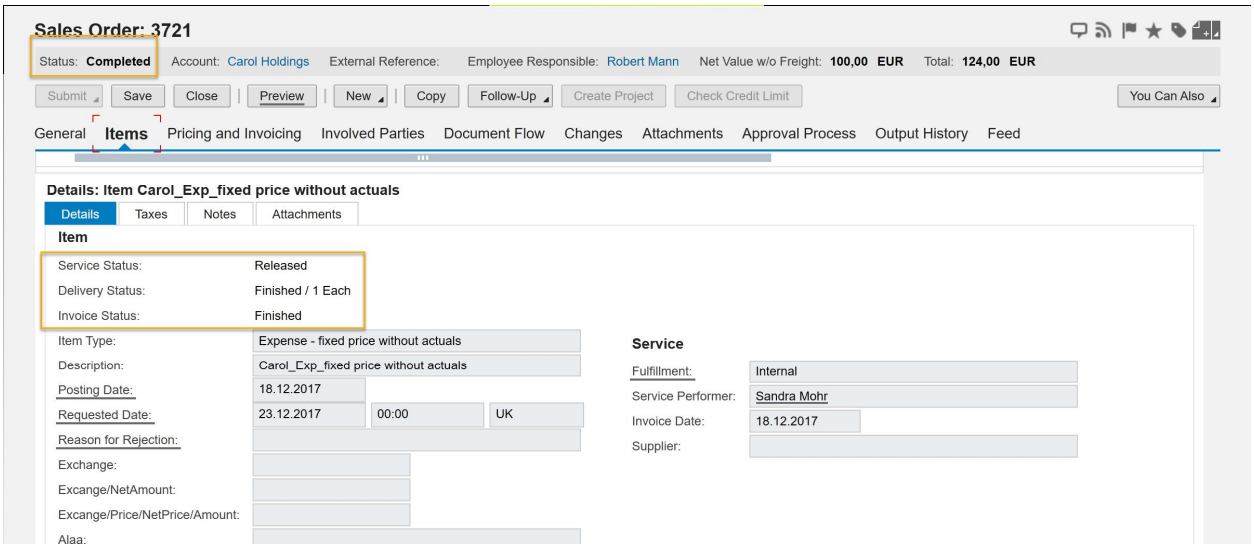
If you go to Customer Invoice WoC> Invoice Request, you will find other than Sales Order's invoice request, there is one more invoice request for Service Confirmation with the value you've input in Service Confirmation.

5. ONLY Invoice Sales Order.



Back to the Respective Sales Order.

Sales Order has been completed with all steps Finished.



NOTE:

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