

Sales Order – Service - 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.”

Business Option	Review Status	In Scope	Conflict
Group: Project-Based Invoicing (1)			
You use project-based invoicing to invoice your customer projects.	Not Reviewed	<input checked="" type="checkbox"/>	
Group: Sell Project-Based Products (1)			
You can sell project-based products.	Not Reviewed	<input checked="" type="checkbox"/>	
Group: Sell Project-Based Services (1)			
You can sell project-based services.	Not Reviewed	<input checked="" type="checkbox"/>	
Group: Selling Projects with Sales Orders (1)			
You use sales orders to sell projects.	Not Reviewed	<input checked="" type="checkbox"/>	

1. Release the Sales Order

If you've 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.

Line	ATP	Product	Description	Contract Item	Quantity	List Price	Discount (%)
10		CAROL_PBF - Carol_Service - fixed price (project)	Carol_Serv		1 ea	EUR	100

Details: Item Carol_Service - fixed price (project)

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

Item Type: Service - fixed price (project)
Description: Carol_Service - fixed price (project)
Posting Date: 16.12.2017
Requested Date: 21.12.2017 00:00 UK
Reason for Rejection: Order not released; No project task is assigned to item 10

2. Create Project

New Sales Order

Submit Save Close Create with Reference **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_PBFP - Carol_Service - fixed price (project)	Carol_Serv		1 ea	EUR	100

Details: Item Carol_Service - fixed price (project)

Details Taxes Notes Attachments

Item

Service Status: Not Started
 Delivery Status: Not Started
 Invoice Status: Not Started
 Item Type: Service - fixed price (project)
 Description: Carol_Service - fixed price (project)
 Posting Date: 16.12.2017
 Requested Date: 21.12.2017 00:00 UK
 Reason for Rejection:

Service

Working Condition:

Input the necessary information to create the project.

New Project

Project Structure: * One Task for Each Item
 Person Responsible: * E0005
 Responsible Unit: * P1110

Copy Revenue:
 Duration: 1 Day(s)

You will get the information message as "Project CPSO179 (3714) has been created. You can edit it as soon as you have saved the sales order."

Details: Item Carol_Service - fixed price (project)

Details Taxes Notes Attachments

Item

Service Status: Not Started
 Delivery Status: Not Started
 Invoice Status: Not Started
 Item Type: Service - fixed price (project)
 Description: Carol_Service - fixed price (project)
 Posting Date: 16.12.2017
 Requested Date: 21.12.2017 00:00 UK
 Reason for Rejection:

Service

Working Condition:

i Project CPSO179 (3714) has been created. You can edit it as soon as you have saved the sales order.

3. Save and Release the Sales Order.

The Order Status changed to Open but in the drop down list, you find there is no option for you to release the Service item.

Sales Order: 3714

Status: **Open** Account: Carol Holdings External Reference: Project: CPSO179 - 3714 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
Confirm Service Execution
Complete Service Execution

Invoiced Parties	Description	Contract Item	Quantity	List Price	Discount (%)
Service - fixed price (project)	Carol_Serv		1 ea	100,00 EUR	100

Details: Item Carol_Service - fixed price (project)

Details Taxes Notes Attachments

Item

Service Status: Not Started
 Delivery Status: Not Started
 Invoice Status: Not Started
 Item Type: Service - fixed price (project)
 Description: Carol_Service - fixed price (project)
 Posting Date: 16.12.2017
 Requested Date: 21.12.2017 00:00 UK
 Reason for Rejection:

Service
Working Condition:

A project has been attached to the respective Sales Order with the Status In Planning.

Sales Order: 3714

Status: **Open** Account: Carol Holdings External Reference: Project: CPSO179 - 3714 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

```

    graph LR
      SO[Sales Order 3714  
Status: Open  
Created On: 16.12.2017] --> P[Project CPSO179  
Status: In Planning  
Created On: 16.12.2017]
  
```

Since this item type is Project Based, you need to accomplish the Service through the Project.

4. Release the related Project.

Maintain Project: 3714

3714 CPSO179 Status: **Released** On Hold: No Start Date: 16.12.2017 Finish Date: 16.12.2017

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 Attachments

Project ID: CPSO179
 Project Name: 3714
 Duration: 1 Day(s)
 Person Responsible: Sandra Mohr
 Project Language: English
 Time Recording: No Approval Required
 Work Description: No Work Description Required

Project Status: Released
 Completion Date:
 On Hold:
 Estimated Project PoC: 0%
 Estimated PoC: 0%
 Project Type: Customer project with sales integration
 Priority:
 Risk:
 Mail Notification:

Back to the respective Sales Order's Document Flow.

The Status of Project has been changed to Released while the status of Sales Order remains Open.

The screenshot shows the SAP interface for Sales Order 3714. The top navigation bar includes the following information: Status: **Open**, Account: Carol Holdings, External Reference: Project: CPSO179 - 3714, Employee Responsible: Robert Mann, and Net Value w/o Freight. Below this are buttons for Submit, Save, Close, Preview, New, Copy, Follow-Up, Create Project, and Check Credit Limit. The main menu includes General, Items, Pricing and Invoicing, Involved Parties, **Document Flow**, Changes, Attachments, Approval Process, and Output. The Document Flow diagram shows a Sales Order (3714) with Status: **Open** and Created On: 16.12.2017, connected to a Project (CPSO179) with Status: **Released** and Created On: 16.12.2017.

The Delivery Status on item level remains Not Started.

The screenshot shows the SAP interface for Sales Order 3714, specifically the Item Details for 'Item Carol_Service - fixed price (project)'. The top navigation bar includes: Status: **Open**, Account: Carol Holdings, External Reference: Project: CPSO179 - 3714, Employee Responsible: Robert Mann, and Net Value w/o Freight: **100,00 EUR**. Below this are buttons for Submit, Save, Close, Preview, New, Copy, Follow-Up, Create Project, and Check Credit Limit. The main menu includes General, **Items**, Pricing and Invoicing, Involved Parties, Document Flow, Changes, Attachments, Approval Process, Output History, and Feed. The Item Details section shows: Service Status: Not Started, Delivery Status: **Not Started**, and Invoice Status: Not Started. The Item Type is 'Service - fixed price (project)'. The Description is 'Carol_Service - fixed price (project)'. The Posting Date is 16.12.2017. The Requested Date is 21.12.2017, with a time of 00:00 and a currency of UK. The Working Condition is empty.

5. Maintain the time recording for the project .

Login with Person Responsible of the Project(In this case, Sandra Moher), and record the time via Home> Self-Services Overview> Edit Time Sheet> Add Time Entry

Edit Time Sheet

Employee: Sandra Mohr Reporting Line Unit: Finanzen Manager: Peter Grün

Release Save and Close Save Close View Activity Report Hide Calendar

44	30	31	1	2	3	4	5	48				1	2	3	1	1	2	3	4	5	6	7	
45	6	7	8	9	10	11	12	49	4	5	6	7	8	9	10	2	8	9	10	11	12	13	14
46	13	14	15	16	17	18	19	50	11	12	13	14	15	16	17	3	15	16	17	18	19	20	21
47	20	21	22	23	24	25	26	51	18	19	20	21	22	23	24	4	22	23	24	25	26	27	28
48	27	28	29	30				52	25	26	27	28	29	30	31	5	29	30	31	1	2	3	4
49																6	5	6	7	8	9	10	11

Unreleased Released Rejected Today Day Off Public Holiday

TimeEntries: Saturday, December 16, 2017 - Target Hour(s) : 00:00 Hour(s)

Group By: None Add Time Entry Manage My Worklist Actions 16.12.2017 View: Day

Start Time	Task	Activity	Hours	End Time	Work Description	Project	Status
03:00	CPSO179-1	Carol_Service	01:00	04:00		CPSO179 - 37...	Active

Back to the respective Sales Order.

The Status of Sales Order changed to In Process after accomplish time recording.

And Delivery Status changed to In Process.

Sales Order: 3714

Status: **In Process** Account: Carol Holdings External Reference: Project: CPSO179 - 3714 Employee Responsible: Robert Mann Net Value w/o

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 His

Line	ATP	Product	Description	Contract Item	Quantity
10		CAROL_PBFP - Carol_Service - fixed price (project)	Carol_Serv		1 ea

Details: Item Carol_Service - fixed price (project)

Details Taxes Notes Attachments

Item

Service Status:

Delivery Status: **In Process**

Invoice Status: Not Started

Item Type: Service - fixed price (project)

Description: Carol_Service - fixed price (project)

Posting Date: 16.12.2017

Requested Date: 21.12.2017 00:00 UK

Reason for Rejection:

Exchange:

Service

Working Condition:

6. Generate Project invoice Request via Customer Invoicing WoC> Project Invoicing> Projects

Project Invoicing: Projects

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

Show **Modified View - Active Custome** and Find **CPSO179** **Go** Advanced

View **New** Export Edit Project Invoice Request

Project	Risk	Status	On ...	Person Responsible
CPSO179		Released	<input type="checkbox"/>	Sandra Mohr

Details:

Manual Project Invoice Request
Automatic Project Invoice Request
Task
Notification

Person Responsible: [Sandra Mohr](#) Responsible Unit: **P1110 Vertrieb Heizungen**
 Start Date: 16.12.2017 Requesting Unit:
 Finish Date: 16.12.2017 Account: [CAROLTEST Carol Holdings](#)
 Program:

Release the Project Invoice Request.

Project Invoice Request: 424

Status: **Released** Account: [Carol Holdings](#) Sales Order: **3714** Project: [CPSO179](#) Time and Expenses From/To: **unlimited / 16.12.2017**

Release **Save** Close Preview **New** Customer Project Overview Itemized List Check Cancel Invoice Request

General Items Pricing Involved Parties Document Flow Changes Attachments

Status: **Released** Sales Order: **3714**
 Invoice Date: **16.12.2017** Project: **CPSO179 - 3714**
 Seller: **Almika NEW GmbH**
 Currency: **Euro**
 External Reference:
 Restrict Time and Expenses: **By Specific Dates**
 Time and Expenses From/To: / **16.12.2017**

Organizational Assignment
 Invoicing Unit: **Vertrieb Heizungen**
 Employee Responsible: **Robert Mann**
 Sales Unit: **Vertrieb Heizungen**
 Sales Organization: **Vertrieb Heizungen**
 Distribution Channel: **Direct sales**

Account
 Name: **Carol Holdings**
 Address: **Rosenthaler Str. 31**
10178 Berlin

Bill-To
 Name: **Carol Holdings**
 Address: **Rosenthaler Str. 31**
10178 Berlin

Project invoice request 424 is released 2 Messages

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 **Go** Advanced

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

Status	Document ID	Invoice Request Type	External Reference	Account	Invoice Date	Net
To Be Invoiced	424	Customer Project Invoice Request		Carol Holdings	16.12.2017	100,00

Details: Customer Project Invoice Request 424

Line	Status	Docu...	Product ID	Description	Quantity	List Price	Discou...	Net Price	Net Value	Invoic...
100	To Be Invoiced	Sales ...	CAROL_PBF	Carol_Service - fixed price (project)	1 ea	100,00 EUR		100,00	100,00	16.12...

The Invoice Status in the Sales Order changed to In Process.

Sales Order: 3714

Status: **In Process** Account: Carol Holdings External Reference: Project: CPSO179 - 3714 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_Service - fixed price (project)

Details Taxes Notes Attachments

Item

Service Status:
 Delivery Status: In Process
 Invoice Status: In Process

Item Type: Service - fixed price (project)
 Description: Carol_Service - fixed price (project)
 Posting Date: 16.12.2017
 Requested Date: 21.12.2017 00:00 UK
 Reason for Rejection:
 Exchange:
 Exchange/NetAmount:
 Exchange/Price/NetPrice/Amount:
 Alaa:
 Process Type: Sales Order

Service

Working Condition:
 Invoice Date: 16.12.2017

7. To make the invoice status to finished, you have to manually finish the invoicing in the project invoice> Sales Orders.

Project Invoicing: Sales Orders

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

Show Open Sales Orders and Find Go Advanced

Group By None View New Export Change Status Edit Project Invoice Request

Invoice Status	Sales Order ID	Account	Change Status	Project ID	Project Name	Description
In Process	3714	Carol Holdings	Finish Invoicing Revoke Finish Invoicing	CPSO179	3714	
In Process	3666	Account CRM		CPSO177	3666	
Not Started	3655	Heizung und Sanitär GmbH		CPSO176	3655	
Not Started	3622	Heizung und Sanitär GmbH		CPSO175	3622	
Not Started	3620	Heizung und Sanitär GmbH		CPSO170	3602	
Not Started	3619	Carol Holdings		CPSO174	3616	
In Process	3616	Carol Holdings		CPSO174	3616	

Sales Order: 3714

Status: **In Process** Account: Carol Holdings External Reference: Project: CPSO179 - 3714 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

Item

Service Status:
 Delivery Status: In Process
 Invoice Status: **Finished**

Item Type: Service - fixed price (project)
 Description: Carol_Service - fixed price (project)
 Posting Date: 16.12.2017
 Requested Date: 21.12.2017 00:00 UK
 Reason for Rejection:
 Exchange:
 Exchange/NetAmount:
 Exchange/Price/NetPrice/Amount:
 Alaa:
 Process Type: Sales Order

Service

Working Condition:
 Invoice Date: 16.12.2017

Ship-To

8. To make the order delivery status to finished, you have to complete the project.

Project Plan Team and Staffing Products Sales Tracking Project Overview Feed

Gantt Chart Work Breakdown Structure Network Diagram

You can create project tasks graphically by drawing a task bar. To change the dates or duration of a project task, select the bar and move, enlarge, or shorten it. To add dependencies, click the bar and draw an arrow to another task. To change the dependency type, click on the arrow.

Show: Basic Add Delete Copy ↑ ↓ Collapse Search Scroll To Earliest Dates >>

Name	ID	Duration	Person	Status
3714	CPSO179	1 Day(s)	Sandra Mohr	Released
○ Carol_Service - fixed price (project)	CPSO179-1	1 Day(s)	Sandra Mohr	Released

December 2017
Dec Week 51, 18 Dec Week

Sales Order has completed.

Sales Order: 3714

Status: **Completed** Account: Carol Holdings External Reference: Project: CPSO179 - 3714

Total: 124,00 EUR

Submit Save Close Preview New Copy Follow-Up Create Project

General **Items** Pricing and Invoicing Involved Parties Document Flow Changes

Add Row Remove Check Availability Assign Source of Supply Replace Product

Line	ATP	Product	Description
10		CAROL_PBF - Carol_Service - fixed price (project)	Carol_Serv

Details: Item Carol_Service - fixed price (project)

Details Taxes Notes Attachments

Item

Service Status:

Delivery Status: Finished / 1 Each

Invoice Status: Finished

Item Type: Service - fixed price (project)

Description: Carol_Service - fixed price (project)

