Sales Order --Service - fixed price

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With Time Recording:

Edit Project Scope>Questions>Sales>Selling Products and Services>Sales Orders

1 Country and Type of Business 2 Implementation Focus	3 Scoping 4 Questions 5 Review 6 Confirmation			
Previous Next Finish Cancel Save Draft				
Export Display Scope Changes				-
Scoping Element	Business Option	Review Status	In Scope	Conflict
New Business	Do you want to confirm quantities and requested dates by initiating an availability check in the sales order?	Reviewed		
Selling Products and Services	Do you want to immediately confirm quantities and requested dates during sales order creation based on an availability check?	Reviewed	v	
Sales Orders	▲ Group: External Labor Resources for Sales Orders (1)			
Customer Contracts	Do you outsource service jobs?	Reviewed	V	
 E-Selling 				
Customer Returns	▲ Group: Invoice Schedule for Sales Order (1)			
Communication for Selling Products and Sen	Do you want to schedule invoices in sales orders?	Reviewed	\checkmark	
 Analysis for Selling Products and Services 	✓ Group: Sales Order Processing with Time Recording (1)			
Customer Invoicing	Do you want to record time for sales orders?	Reviewed	v	

1. Release Sales Order

Status of Sales Order changed to Open.

les Order: 3696										ロッ 🖬 ¥ 🦻 U
atus: Open Account: Caro	I Holdings Externa	I Refe	erence: Employe	e Responsi	ble: Robe	ert Mann Net Value w/o	Freight: 80,00 EUR	Total: 99,20 E	UR	
Submit J Save Close	Preview	New	🖌 🛛 Сору	Follow-Up	Crea	te Project Check Cre	edit Limit			You Can Als
neral Items Pricing a	and Invoicing Inv	olve	d Parties Docu	ment Flow	Chan	ges Attachments	Approval Process	Output History	Feed	
		_			-			t		
			111							
ataila: Itam Caral Card	a fived price									
Details: Item Carol_Servi	· · ·	_								
Details Taxes No Item	tes Attachments	3								
		-								
Service Status:	Not Released									
Delivery Status:	Not Started									
Invoice Status:	Not Started					Service				
Item Type:	Service - fixed	price				Fulfillment:	Internal			~
Description:	Carol Service	- fixed	d price			Service Performer:	Sandra Mohr			r d
Posting Date:	14.12.2017	1				Labor Resource:	RES100			ð
Requested Date:	19.12.2017	1	00:00 🗸	UK	*	Working Condition:				*
					~	Duration:	1 Hour(s)			
					*	Duratoff.				
Reason for Rejection:										
						Invoice Date:	14.12.2017			đ

2. Release to Service Execution

Status of Sales Order changed from Open to In Process.

Service Status changed to Released.

les Order: 3696							
atus: In Process Account: Ca	rol Holdings External Referen	ce: Employee Resp	onsible: Rober	rt Mann Net Val	ue w/o Freight: 80,00	EUR Total: 99,2	20 EUR
Submit J Save Close	Preview New	Copy Follow-Up 🖌	Create Proj	ject Check Cr	redit Limit		
neral Items Pricing and	Invoicing Involved Parties	Document Flow	Changes	Attachments	Approval Process	Output History	Feed
etails: Item Carol_Service -	- fixed price						
Details Taxes Notes	Attachments						
Details Taxes Notes Item	Attachments						
	Attachments						
Item							
Item Service Status:	Released		s	Service			
Item Service Status: Delivery Status:	Released Not Started			Service	Internal		~
Item Service Status: Delivery Status: Invoice Status:	Released Not Started Not Started		Ē		Internal Sandra Mohr		· · ·
Item Service Status: Delivery Status: Invoice Status: Item Type:	Released Not Started Not Started Service - fixed price		<u>F</u>	ulfillment:			
Item Service Status: Delivery Status: Involce Status: Item Type: Description:	Released Not Started Not Started Service - fixed price Carol_Service - fixed price	• UK	E E	Fulfillment: Service Performer:	Sandra Mohr RES100		đ
Item Service Status: Delivery Status: Invoice Status: Item Type: Description: Posting Date:	Released Not Started Not Started Service - fixed price Carol_Service - fixed price 14.12.2017	• UK	F S L ✓ V	<u>Fulfillment:</u> Service Performer: Labor Resource:	Sandra Mohr RES100		7 7
Item Service Status: Delivery Status: Invoice Status: Item Type: Description: Posting Date: Requested Date:	Released Not Started Not Started Service - fixed price Carol_Service - fixed price 14.12.2017	• UK	• V	Fulfillment: Service Performer: Labor Resource: Working Condition:	Sandra Mohr RES100		7 7

3. Confirm Service Execution

Copying referenced sales order item ID 3696-10 for service confirmation is not possible as it is enabled for time recording.

Account ar	nd Contact	Service Location		
Account:	Carol Holdings	Location of Service Provi	ision:	
Address:	Rosenthaler Str. 31	Address:	Rosenthaler Str. 31	
	10178 Berlin		10178 Berlin	
	Address Details		Germany	
	Germany			
	Address Details			
Contact:	Anna Braun			
Phone:				
E-Mail:	customerbyd@byd.com			
Subject:				
Confirmatio	on Description	Categorization		
Notes:	Work Description Internal Note	Incident Category:		
Work Descrip	tion:			
		Evanutud Bu		

Since Time Recording for Sales Order has been activated, the assigned Service Performer need to accomplish time recording in his/her time for respective Sales Order.

4. Log in as delicate service performer via

Home Work Center>Self-Services Overview>Edit Time Sheet>Add Time Entry

Employee: Sandra Mohr Repo	Add Time Entry			۵ م	×	
Release A Save and Close	Date:	Thursday, December 14, 2017	Current Work Packages			
< November, 2017	Work Package Task:	3696-10 - Carol_Service -	Task	Activity		
Mo Tu We Th Fr S	Activity:*	Carol_Service - fixed price	CPSO161-2	Service_Eda_day_PB		
44 30 31 1 2 3	Hours:	01:00	3696-10 - Carol_Servi	Carol_Service - fixed p		
45 6 7 8 9 10 1 46 13 14 15 16 17 1	Start Time / End Time:	06:00 / 07:00 /	CPSO146-1	PBTM		
47 20 21 22 23 24 2	Purchase Order:	đ	CPSO149-2 - Travel	PBTM 2		
48 27 28 29 30 49	Status:	▲ Inactive	CPSO149-1 - Consulti	PBTM		
49 Unreleased	Work Package Completed:					
_	Working Condition:	•				
Day Off	Service Confirmation Quanity:	1 🔲 Each 🛩				
	Premium Pay:	~				
TimeEntries: Thursday, Dec	Responsible:	0000000000 Augus Davis				
Group By None	Customer:	8000000019 - Anna Braun			Day	• F
Start Time Task						
06:00 <u>3696-10 - Ca</u>				OK Ne:	xt	n

Actions> Release

Back to respective Sales Order> Document Flow>A service confirmation has been automatically generated with status Finished.

Sales Order: 3696		କ ୬ ⊫ ≭ ୭ 🖡
Status: In Process Account: Card	ol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 80,00 EUR Total: 99,20 EU	R
Submit A Save Close	Preview New A Copy Follow-Up A Create Project Check Credit Limit	You Can Also
General Items Pricing and In	voicing Involved Parties Document Flow Changes Attachments Approval Process Output History F	eed
Sales Order	Service Confirmation	
3696	851	
-		
Status:	Status:	
In Process	Finished Created On:	
Created On:	14 12 2017	
	± @	

The Delivery Status changed from Not Started to In Process.

Status: In Process Account:	Carol Holdings External Reference: Employee Responsi	ole: Robert Mann Net Valu	ue w/o Freight: 80,00 EUR Total: 99,20 EUR	
Submit J Save Close	Preview New Copy Follow-Up	reate Project Check Cr	edit Limit	You Can Also
General Items Pricing a	nd Invoicing Involved Parties Document Flow Cl	anges Attachments	Approval Process Output History Feed	
		_		
Details: Item Carol_Servio	ce - fixed price			
Details Taxes Not				
Item				
Service Status:	Released			
Delivery Status:	In Process / 1 Each			
Invoice Status:	Not Started	Service		
Item Type:	Service - fixed price	Fulfillment	Internal	
Description:	Carol_Service - fixed price	Service Performer:	Sandra Mohr	
Posting Date:	14.12.2017	Labor Resource:	RES100	đ
Requested Date:	19.12.2017 🛐 00:00 🗸 UK 🗸	Working Condition:		*
Reason for Rejection:	~	Duration:	1 Hour(s)	
Euclidean and		Inclusion Data	44 40 0047	

5. Complete Service Execution

Delivery Status changed from In Process to Finished.

Sales Order: 3696			ロット 🖌 🖉 📳
Status: In Process Account: Car	ol Holdings External Reference: Employee Responsible	: Robert Mann Net Value w/o Freight: 80,00 EUR Total: 99,20 EUR	
Submit Save Close General Items Pricing and I		ate Project Check Credit Limit nges Attachments Approval Process Output History Feed	You Can Also
Details: Item Carol_Service - Details Taxes Notes Item	fixed price Attachments		
Service Status:	Released		
Delivery Status:	Finished / 1 Each		
Invoice Status:	Not Started	Service	
Item Type:	Service - fixed price	Fulfiliment: Internal	
Description:	Carol_Service - fixed price	Service Performer: Sandra Mohr	
Posting Date:	14.12.2017	Labor Resource: RES100	
Requested Date:	19.12.2017 📋 00:00 🗸 UK 🗸	Working Condition:	
Reason for Rejection:	*	Duration: 1 Hour(s)	
Exchange:		Invoice Date: 14.12.2017	
Excange/NetAmount:		Supplier:	
Excange/Price/NetPrice/Amount:			

- 6. Invoice the Sales Order invoice request.
- Ø Since the item type is Service fixed price, it's necessary for delicate service performer to record time for business usage while the fixed price will be copied from Sales Order directly to Customer Invoice regardless the actual time costing.

Show Too Group By	lay's Invoice Request	Edit New Prev	view Export Invoice Invoi	ice - Advanced Check		
Status		≜ Document ID	Invoice Request Type	External Reference	Account	Invoice Da
To Be In	voiced	3696 🔺	Sales Order Invoice Request		Carol Holdings	14.12.201
Details: S	ales Order Invoic	e Request 3696	11			
Details: S	ales Order Invoic	e Request 3696 Product ID	Description	Quantity		
						80,00 EU

Back to respective Sales Order and it's completed.

	Sales Order: 3	<mark>6</mark> 96		口 シ le
	Status: Completed	Account: Carol Holdings External Reference: Employee Res	sponsible: Robert Mann Net Value w	o Freight: 80,00 EUR Total: 99,20 EUR
Q,	Submit 🖌 Save	Close Preview New Copy Follow-Up	Create Project Check Credit L	imit
5	General Items	Pricing and Invoicing Involved Parties Document Flow	r Changes Attachments App	proval Process Output History Feed
**	Account		Contact	
	Name:*	Carol Holdings New	∡ Contact:	Anna Braun
	Address:	Rosenthaler Str. 31	Phone:	
		10178 Berlin		Address Details
		Germany	E-Mail:	customerbyd@byd.com
		Address Details	Test EXT:*	t
	EXTACCINV:			
			Bill-To	
	Ship-To		Name:	Carol Holdings
	Name:	Carol Holdings New	Address:	Rosenthaler Str. 31
	Address:	Rosenthaler Str. 31		10178 Berlin
		10178 Berlin		Germany
		Germany		Address Details
		Address Details		
			Organizational Assi	gnment
	General		Employee Reenensible:	Pohort Monn

Without Time Recording Enabled:

1. Release Sales Order

Sales Order: 3712				-
Status: Open Account: Carol Hol	Idings External Reference: Employee Responsible	e: Robert Mann Net Value w/o F	Freight: 80,00 EUR Total: 99,2	0 EUR
Submit Save Close	Preview New Copy Follow-Up	Create Project Check Cred	lit Limit	
		,		
General Items Pricing and I	Invoicing Involved Parties Document Flow	Changes Attachments A	pproval Process Output Hist	tory Feed
Details: Item Carol_Service -	fixed price			
Details Taxes Notes	Attachments			
Item	Audormento			
Service Status:	Not Released			
Delivery Status:	Not Started			
Invoice Status:	Not Started	Service		
Item Type:	Service - fixed price	Fulfillment:	Internal	*
Description:	Carol_Service - fixed price	Service Performer:	Sandra Mohr	Ø.
	15.12.2017	Labor Resource:	RES100	
Posting Date:	13.12.2017			D D
				∂
Requested Date:		Working Condition:		
Requested Date: Reason for Rejection:	20.12.2017 🝸 00:00 🗸 UK	Working Condition: Duration:	1 Hour(s)	
Requested Date:		Working Condition:		

2. Release to Service Execution

Status of Sales Order changed from Open to In Process.

Service Status changed to Released.

s	Sales Order: 3712				р ф
S	Status: In Process Account: Card	ol Holdings External Reference: Employee Respon	nsible: Robert Mann Net Val	ue w/o Freight: 80,00 EUR Total: 99,2	0 EUR
Q,	Submit Save Close	Preview New A Copy Follow-Up A	Create Project Check Cr	redit Limit	Ŷ
7	General Items Pricing and I	nvoicing Involved Parties Document Flow	Changes Attachments	Approval Process Output History	Feed
	Details: Item Carol_Service -	fixed price			
	Details Taxes Notes	Attachments			
	Item				
	Service Status:	Released			
	Delivery Status:	Not Started			
	Invoice Status:	Not Started	Service		
	Item Type:	Service - fixed price	Fulfillment:	Internal	*
	Description:	Carol_Service - fixed price	Service Performer:	Sandra Mohr	đ
	Posting Date:	15.12.2017	Labor Resource:	RES100	đ
	Requested Date:	20.12.2017 🛅 00:00 🗸 UK	✓ Working Condition:		*
	Reason for Rejection:		✓ Duration:	1 Hour(s)	
	Exchange:		Invoice Date:	15.12.2017	
	Excange/NetAmount:		Supplier:		đ
	Excange/Price/NetPrice/Amount:				
	Alaa:				
	Process Tune	Sales Order			

3. Confirm Service Execution

In the New Service Execution, you can input the actual duration spent in Service Delivery.

You will get a warning message says "Item 10: Fulfilled quantity is greater than ordered quantity" if the value you've input is greater than the original value in Sales Order.

But this won't block you from completing the service process.

	New Serv	ice Conf	irmation										
	Release 🖌	Save	Close										You
Q,	Arrived On:		1	*					-				
5	Fixed On:		1	*									
ññ	Services and	d Spare Pa	irts										
						e or parts consumption is not finalized (further conf							
	Add Row	Remov	e Release 🖌										
	Line	Status =	Product			Description	Coverage		Quantit	Actual Duration	1	Referen Sales C Item	
	10	Not Star	CAROL_SERVICE	- Carol_Service - fixe	ed price	Carol_Service - fixed		2 🛛]ea ∽	2 Hour(s)		3712	<u>10</u>
						Tota	I Item Net Va	alue:		160,0	0 EUR		
							rall Discount	(%):			1		
	() Item 10: Fi	ulfilled quanti	ty is greater than orde	red quantity		Freid	aht:						

4. Release Service Confirmation with Order Completion.

Back to the respective Sales Order and check Document Flow.

Service Confirmation has the status Finished but no Service Confirmation Invoice Request has been created. This is because that the item type is Service - fixed price, the invoice request will be based on Sales Order but not Service Confirmation.

	Sales	Order: 3712									
	Status: I	n Process Account: Ca	rol Holdir	ngs External Referen	nce: Emp	loyee Resp	onsible: Robe	ert Mann Net	Value w/o Fre	ight: 80,00	EUR
Q,	Submit	▲ Save Close	Previe	ew New	Copy	ollow-Up 🛓	Create Pro	oject Chec	k Credit Limit		
5	General	Items Pricing and I	nvoicing	Involved Parties	Docum	ent Flov	V Change	s Attachme	ents Appro	val Proces	s O
**	Docum	ent Flow			-						
	Show:	Extended View		~	0, 100%	0, 🖑	Refresh	Return to Initia	al View	lide Details	
		Sales Order 3712 Status: In Process Created On: 15.12.2017		Service Confirmation	n						

Sales Order: 3712						ଢ ୬ ⊫ ★ ୭ 🕯
Status: In Process Account: Care	ol Holdings External Re	eference: Employe	e Responsibl	e: Robert Mann Net Value	e w/o Freight: 80,00 EUR Total: 99,20 EUR	
Submit J Save Close	Preview New 4	Copy Follow		eate Project Check Cred	dit Limit	You Can Also
General Items Pricing and I	nvoicing Involved P	arties Document	Flow Cha	anges Attachments A	Approval Process Output History Feed	
Details: Item Carol_Service -	fixed price					
Details Taxes Notes	Attachments					
Item						
Service Status:	Released					
Delivery Status:	Finished / 2 Each					
Invoice Status:	Not Started			Service		
Item Type:	Service - fixed price			Fulfillment:	Internal	
Description:	Carol_Service - fixed pr	ice		Service Performer:	Sandra Mohr	
Posting Date:	15.12.2017			Labor Resource:	RES100	
Requested Date:	20.12.2017	:00 👻 UK	~	Working Condition:		
Reason for Rejection:			~	Duration:	1 Hour(s)	
Exchange:				Invoice Date:	15.12.2017	
Excange/NetAmount:				Supplier:		
Excange/Price/NetPrice/Amount:						
Alaa:						
Process Type:	Sales Order					

5. Invoice the Sales Order Invoice Request.

Show Tod	day's Invoice Requests	and Find	Go				C Advanced
Group By	None 🖌 📔	Edit New 🖌 Pre	view Export (Invoice Invo	bice - Advanced Check			7 🖬
Status		Document ID	Invoice Request Type	External Reference	Account	Invoice Date	N
To Be Inv	voiced	3712 🗖	Sales Order Invoice Request		Carol Holdings	15.12.2017	80,
_	VICEU	0112			Caror Holdingo	13.12.2017	00,
Details: S	sales Order Invoice			Quantity			st Price

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

Sales Order: 3712								
Status: Completed Account: Car	ol Holdings Extern	al Reference:	Employee Respo	onsible: Rober	t Mann Net Val	lue w/o Freight: 80,00	EUR Total: 99,	20 EUR
Submit A Save Close	Preview	v 🖌 🗌 Сору	Follow-Up 🖌	Create Proje	ect Check Cr	redit Limit		
General Items Pricing and I	nvoicing Involve	d Parties D	ocument Flow	Changes	Attachments	Approval Process	Output History	Feed
Details: Item Carol_Service -	fixed price							
Details Taxes Notes	Attachments							
Item								
Service Status:	Released	1						
Delivery Status:	Finished / 2 Each							
Invoice Status:	Finished			s	ervice			
Item Type:	Service - fixed price			F	ulfillment:	Internal		
Description:	Carol_Service - fixe	d price		S	ervice Performer:	Sandra Mohr		
Posting Date:	15.12.2017			L	abor Resource:	<u>RES100</u>		
Requested Date:	20.12.2017	00:00	UK	V	Vorking Condition:			
Reason for Rejection:				D	uration:	1 Hour(s)		
Exchange:				Ir	voice Date:	15.12.2017		
Excange/NetAmount:				S	upplier:			
Excange/Price/NetPrice/Amount:								
Alaa:								