

Sales Order --Service - fixed price

Contents

With Time Recording:	2
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With Time Recording:

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

Edit Project Scope: First Implementation

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

- New Business
- Selling Products and Services
 - Sales Orders**
 - Customer Contracts
 - E-Selling
 - Customer Returns
 - Communication for Selling Products and Services
 - Analysis for Selling Products and Services
- Customer Invoicing
- Sales Planning
- Service

Business Option	Review Status	In Scope	Conflict
Do you want to confirm quantities and requested dates by initiating an availability check in the sales order?	Reviewed	<input type="checkbox"/>	
Do you want to immediately confirm quantities and requested dates during sales order creation based on an availability check?	Reviewed	<input checked="" type="checkbox"/>	
Group: External Labor Resources for Sales Orders (1)			
Do you outsource service jobs?	Reviewed	<input checked="" type="checkbox"/>	
Group: Invoice Schedule for Sales Order (1)			
Do you want to schedule invoices in sales orders?	Reviewed	<input checked="" type="checkbox"/>	
Group: Sales Order Processing with Time Recording (1)			
Do you want to record time for sales orders?	Reviewed	<input checked="" type="checkbox"/>	

1. Release Sales Order

Status of Sales Order changed to Open.

Sales Order: 3696

Status: **Open** Account: Carol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 80,00 EUR Total: 99,20 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

Details Taxes Notes Attachments

Item

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

Item Type: Service - fixed price
Description: Carol_Service - fixed price
Posting Date: 14.12.2017
Requested Date: 19.12.2017 00:00 UK
Reason for Rejection:
Exchange:
Exchange/NetAmount:

Service

Fulfillment: Internal
Service Performer: Sandra Mohr
Labor Resource: RES100
Working Condition:
Duration: 1 Hour(s)
Invoice Date: 14.12.2017
Supplier:

2. Release to Service Execution

Status of Sales Order changed from Open to In Process.

Service Status changed to Released.

Sales Order: 3696

Status: **In Process** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **80,00 EUR** Total: **99,20 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

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 Invoice Status: Not Started

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 Posting Date: 14.12.2017
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Service

Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 14.12.2017
 Supplier:

Orders Sales Order: 3696

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.

New Service Confirmation

Release Save Close You Can Also View All

Account and Contact

Account: Carol Holdings
 Address: Rosenthaler Str. 31
 10178 Berlin
 Address Details
 Germany
 Address Details
 Contact: Anna Braun
 Phone:
 E-Mail: customerbyd@byd.com
 Subject:

Service Location

Location of Service Provision:
 Address: Rosenthaler Str. 31
 10178 Berlin
 Germany

Confirmation Description

Notes: ☒ Work Description ☐ Internal Note
 Work Description:

Categorization

Incident Category:

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

Sales Orders Sales Order: 3696 New Service Confirm...

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

Edit Time Sheet

Employee: Sandra Mohr

Release Save and Close

Add Time Entry

Date: Thursday, December 14, 2017

Work Package Task: 3696-10 - Carol_Service - [icon]

Activity: * Carol_Service - fixed price [icon]

Hours: 01:00

Start Time / End Time: 06:00 / 07:00

Purchase Order: [icon]

Status: **Inactive**

Work Package Completed: ☐

Working Condition: [dropdown]

Service Confirmation Quantity: 1 Each

Premium Pay: [dropdown]

Responsible: [dropdown]

Customer: 8000000019 - Anna Braun

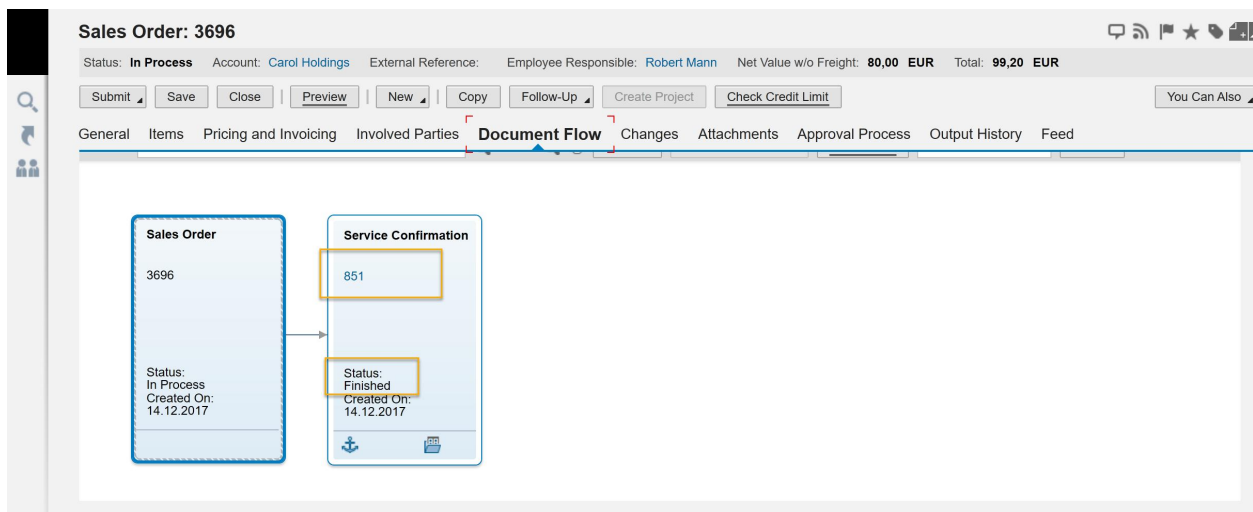
Current Work Packages

Task	Activity
CPSO161-2	Service_Eda_day_PB...
3696-10 - Carol_Servi...	Carol_Service - fixed p...
CPSO146-1	PBTM
CPSO149-2 - Travel	PBTM 2
CPSO149-1 - Consulti...	PBTM

OK Next

Actions> Release

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



The Delivery Status changed from Not Started to In Process.

Sales Order: 3696

Status: **In Process** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **80,00 EUR** Total: **99,20 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

Details Taxes Notes Attachments

Item

Service Status: Released
 Delivery Status: In Process / 1 Each
 Invoice Status: Not Started

Item Type: Service - fixed price
 Description: Carol_Service - fixed price
 Posting Date: 14.12.2017
 Requested Date: 19.12.2017 00:00 UK
 Reason for Rejection:

Service

Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 14.12.2017
 Supplier:

Sales Orders Sales Order: 3696

5. Complete Service Execution

Delivery Status changed from In Process to Finished.

Sales Order: 3696

Status: **In Process** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **80,00 EUR** Total: **99,20 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

Details Taxes Notes Attachments

Item

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

Item Type: Service - fixed price
 Description: Carol_Service - fixed price
 Posting Date: 14.12.2017
 Requested Date: 19.12.2017 00:00 UK
 Reason for Rejection:
 Exchange:
 Exchange/NetAmount:
 Exchange/Price/NetPrice/Amount:
 Alaa:

Service

Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 14.12.2017
 Supplier:

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.

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

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

Status	Document ID	Invoice Request Type	External Reference	Account	Invoice Date
To Be Invoiced	3696	Sales Order Invoice Request		Carol Holdings	14.12.2017

Details: Sales Order Invoice Request 3696

Line	Status	Product ID	Description	Quantity	List
10	To Be Invoiced	CAROL_SERVICE_	Carol_Service - fixed price	1 ea	80,00 EUR

Back to respective Sales Order and it's completed.

Sales Order: 3696

Status: **Completed** | Account: Carol Holdings | External Reference: | Employee Responsible: Robert Mann | Net Value w/o Freight: 80,00 EUR | Total: 99,20 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

Account

Name: New

Address: Rosenthaler Str. 31
10178 Berlin
Germany
[Address Details](#)

EXTACCINV:

Ship-To

Name: New

Address: Rosenthaler Str. 31
10178 Berlin
Germany
[Address Details](#)

Contact

Contact:

Phone:

E-Mail: customerbyd@byd.com

Test EXT:

Bill-To

Name:

Address: Rosenthaler Str. 31
10178 Berlin
Germany
[Address Details](#)

Organizational Assignment

Employee Responsible: Robert Mann

Without Time Recording Enabled:

1. Release Sales Order

Sales Order: 3712

Status: **Open** Account: Carol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 80,00 EUR Total: 99,20 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_Service - fixed price

Details Taxes Notes Attachments

Item

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

Item Type: Service - fixed price
 Description: Carol_Service - fixed price
 Posting Date: 15.12.2017
 Requested Date: 20.12.2017 00:00 UK
 Reason for Rejection:
 Exchange:
 Exchange/NetAmount:
 Exchange/Price/NetPrice/Amount:

Service

Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 15.12.2017
 Supplier:

2. Release to Service Execution

Status of Sales Order changed from Open to In Process.

Service Status changed to Released.

Sales Order: 3712

Status: **In Process** Account: Carol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 80,00 EUR Total: 99,20 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_Service - fixed price

Details Taxes Notes Attachments

Item

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

Item Type: Service - fixed price
 Description: Carol_Service - fixed price
 Posting Date: 15.12.2017
 Requested Date: 20.12.2017 00:00 UK
 Reason for Rejection:
 Exchange:
 Exchange/NetAmount:
 Exchange/Price/NetPrice/Amount:
 Alaa:
 Private Time: Sales Order

Service

Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 15.12.2017
 Supplier:

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 Service Confirmation

Release Save Close You

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 closed). 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
10	Not Star...	CAROL_SERVICE - Carol_Service - fixed price	Carol_Service - fixed		2 ea	2 Hour(s)	3712 10

Total Item Net Value: 160,00 EUR

Overall Discount (%):

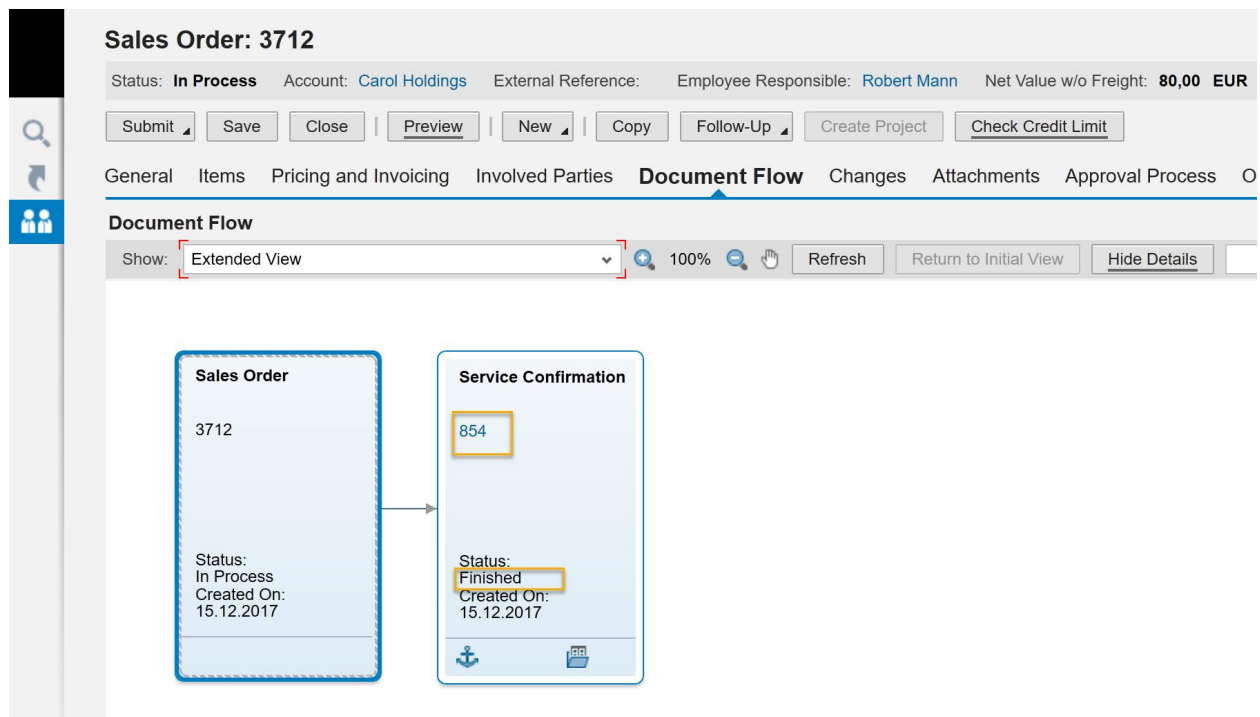
Freight:

Item 10: Fulfilled quantity is greater than ordered quantity

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: **In Process** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **80,00 EUR** Total: **99,20 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

Details Taxes Notes Attachments

Item

Service Status: Released
 Delivery Status: Finished / 2 Each
 Invoice Status: Not Started

Item Type: Service - fixed price
 Description: Carol_Service - fixed price
 Posting Date: 15.12.2017
 Requested Date: 20.12.2017 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
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 15.12.2017
 Supplier:

5. Invoice the Sales Order 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 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	3712	Sales Order Invoice Request		Carol Holdings	15.12.2017	80,00

Details: Sales Order Invoice Request 3712

Line	Status	Product ID	Description	Quantity	List Price
10	To Be Invoiced	CAROL_SERVICE_	Carol_Service - fixed price	1 ea	80,00 EUR

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

Sales Order: 3712

Status: **Completed** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **80,00 EUR** Total: **99,20 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_Service - fixed price

Details Taxes Notes Attachments

Item

Service Status: Released
 Delivery Status: Finished / 2 Each
 Invoice Status: Finished

Item Type: Service - fixed price
 Description: Carol_Service - fixed price
 Posting Date: 15.12.2017
 Requested Date: 20.12.2017 00:00 UK
 Reason for Rejection:
 Exchange:
 Exchange/NetAmount:
 Exchange/Price/NetPrice/Amount:
 Alaa:

Service

Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 15.12.2017
 Supplier:

