

Sales Order –Service - time and material (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.”

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

- Marketing
 - Sales
 - Account and Activity Management
 - Product and Service Portfolio for Sales
 - Sell Standard Products
 - Sell Services
 - Sell Entitlements
 - Sell Project-Based Products and Services
 - Sell Specified Products
 - New Business
 - Selling Products and Services

Business Option Services

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"/>	<input type="checkbox"/>
Group: Sell Project-Based Products (1)			
You can sell project-based products.	Not Reviewed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Group: Sell Project-Based Services (1)			
You can sell project-based services.	Not Reviewed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Group: Selling Projects with Sales Orders (1)			
You use sales orders to sell projects.	Not Reviewed	<input checked="" type="checkbox"/>	<input 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.

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

Item

Service Status: Not Started

Delivery Status: Not Started

Invoice Status: Not Started

Item Type: Service - time and material (project)

Description: Carol_service_time_material (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:

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

Item

Service Status: Not Started
Delivery Status: Not Started
Invoice Status: Not Started
Item Type: Service - time and material (project)
Description: Carol_service_time_material (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:

Order not released; No project task is assigned to item 10

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 information message "Project CPSO180 (3718) has been created. You can edit it as soon as you have saved the sales order."

Now you can save and release the 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: 3718

Status: **Open** Account: Carol Holdings External Reference: Project: CPSO180 - 3718 Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR Total: 124,00

Submit Save Close Preview New Copy Follow-Up Create Project Check Credit Limit

Release Order
Send Order Confirmation to Account
Release to Service Execution
Confirm Service Execution
Complete Service Execution

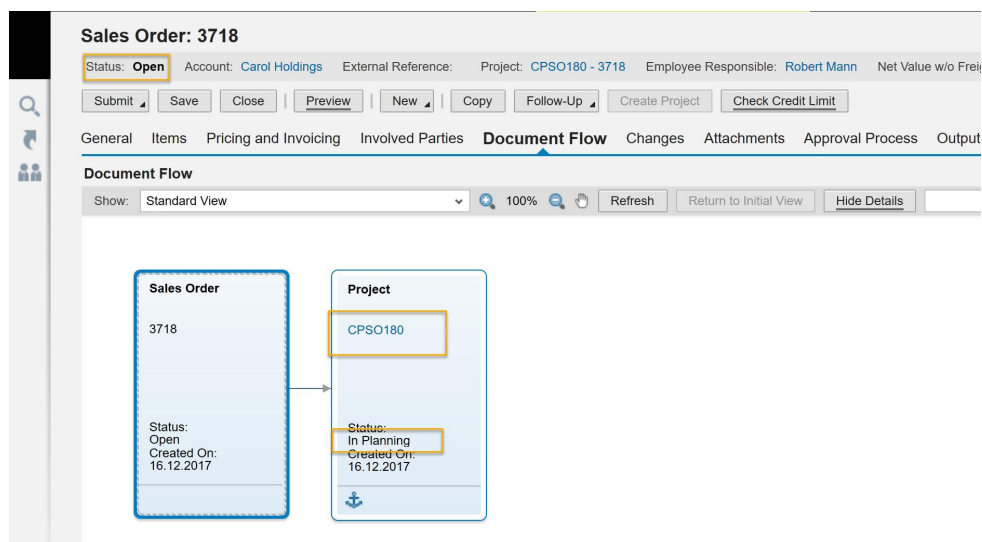
Involved Parties Document Flow Changes Attachments Approval Process Output History Feed

Material (project)

Service Status:
Delivery Status: Not Started
Invoice Status: Not Started
Item Type: Service - time and material (project)
Description: Carol_service_time_material (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:

Service
Working Condition:

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



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

3. Release Project.

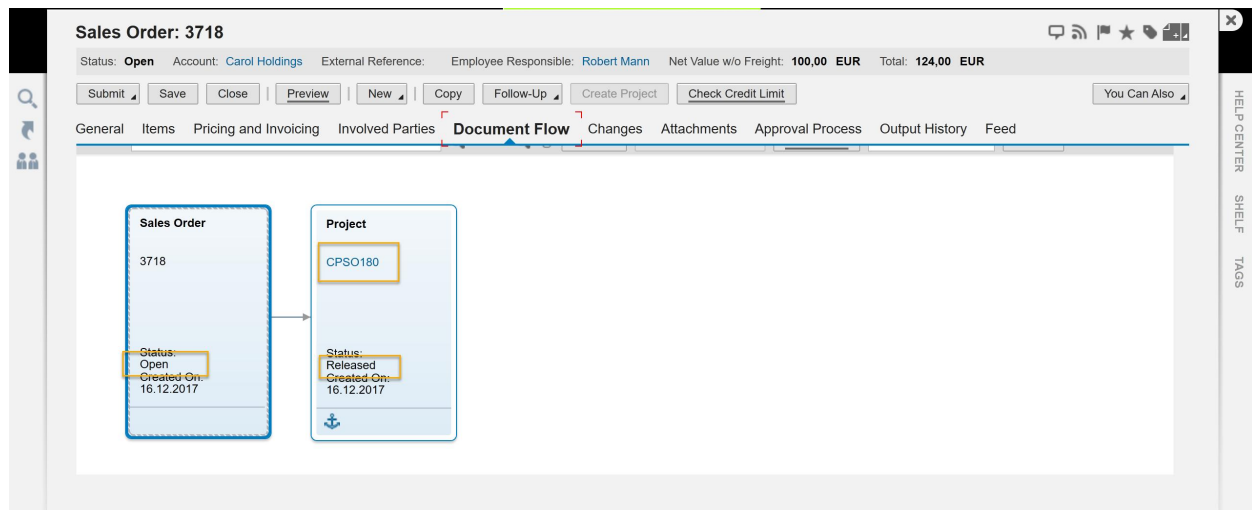
Basic Data Work Materials Expenses Revenues Scheduling Checklists Accounting Attachments

Project ID: CPSO180
Project Name: 3718
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:
Ship From:

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 Delivery Status on Item level remains Not Started.

The screenshot shows the 'Item Details' for 'Item Carol_service_time_material (project)'. The 'Delivery Status' is highlighted as 'Not Started'. The 'Service Status' is also 'Not Started'. The 'Item Type' is 'Service - time and material (project)'. The 'Description' is 'Carol_service_time_material (project)'. The 'Posting Date' is 16.12.2017. The 'Requested Date' is 21.12.2017. The 'Reason for Rejection' is empty. The 'Exchange' is empty. The 'Service' section shows 'Working Condition' as empty. The top of the interface shows the Sales Order header with fields for Status (Open), Account (Carol Holdings), External Reference, Project (CPSO180 - 3718), Employee Responsible, and Net Value w/o Freight (100,00 EUR). Navigation buttons like Submit, Save, Close, Preview, New, Copy, Follow-Up, Create Project, and Check Credit Limit are visible. The bottom of the interface shows a sidebar with 'HELP CENTER', 'SHELF', and 'TAGS'.

4. 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

Release Save and Close

49 Unreleased Day Off

TimeEntries: Saturday, Dec 16, 2017

Group By: None

Start Time Task

03:00 CPSO180 - 3718 Carol_service_time_material_

05:00 CPSO179 - 3718 Carol_service_time_material_

03:00 CPSO179 - 3718 Carol_service_time_material_

Add Time Entry

Date: Saturday, December 16, 2017

Work Package Task: CPSO180 - 3718

Activity: Carol_service_time_material_

Hours: 01:00

Billable Hours: 01:00

Start Time / End Time: 03:00 / 04:00

Purchase Order:

Status: Inactive

Work Package Completed:

Time Type: ZDE01 - test

Premium Pay:

Project: CPSO180 - 3718

Responsible: E0005 - Sandra Mohr

Current Work Packages

Task	Activity
CPSO168 - 3600	cmp_27_TM
CPSO176-1 - Reparatur	Repair
CPSO157-1	Carol_Service - fixed p...
CPSO158-1	PBTM
CPSO159-1	Carol_Service - fixed p...

OK Next

In this case, I recorded 2 work days which is *larger* than the value in Sales Order.

03:00	CPSO180 - 3718	Carol_service_time_material_	01:00	04:00	CPSO180 - 3718	Active		
03:00	CPSO180-1	Carol_service_time_material_	01:00	04:00	CPSO180 - 3718	Active		

Back to respective Sales Order

The status of Sales Order changed to In Process and Delivery Status changed from Not Started to In Process.

Sales Order: 3718

Status: In Process Account: Carol Holdings External Reference: Project: CPSO180 - 3718 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 PDTM - Carol_service_time_material (project)	Carol_serv		1 wday	100,00 EUR	100

Details: Item Carol_service_time_material (project)

Details Taxes Notes Attachments

Item

Service Status:

Delivery Status: In Process

Invoice Status: Not Started

Item Type: Service - time and material (project)

Description: Carol_service_time_material (project)

Posting Date: 16.12.2017

Requested Date: 21.12.2017 00:00 UK

Service

Working Condition:

5. 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 Customer** and Find **cpso180** **Go** **Advanced**

View **New** **Export** **Edit Project Invoice Request**

Project	Manual Project Invoice Request	Risk	Status	On ...	Person Responsible
CPSO1	Automatic Project Invoice Request		Released	<input type="checkbox"/>	Sandra Mohr

Details: **Notification**

Person Responsible: Sandra Mohr
 Start Date: 16.12.2017
 Finish Date: 16.12.2017
 Program:

Responsible Unit: P1110 Vertrieb Heizungen
 Requesting Unit:
 Account: CAROLTEST Carol Holdings

Project Invoice Request: 425

Status: **Released** Account: Carol Holdings Sales Order: 3718 Project: CPSO180 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**

Invoice Items **Time and Expenses**

Total Item Net Value: 200,00 EUR

Details: Carol_service_time_material (project)

General **Time and Expense Items** **Taxes**

Revenue Assignment

Sales Order: 3718
 Sales Order Item: 10 - Carol_service_time_material (project)
 Project Task: CPSO180-1 - Carol_service_time_material (project)
 G/L Account:
 Cash Discount: ☐

Net Value History

Net Value of Sales Order Item: 100,00 EUR
 Net Value Already Invoiced: 200,00 EUR
 Net Value Not Yet Invoiced: 0,00 EUR
 Net Value Over Invoiced: 100,00 EUR

✓ Project invoice request 425 is released **2 Messages**

6. Invoice the Project 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	425	Customer Project Invoice Request		Carol Holdings	16.12.2017	200,00

Details: Customer Project Invoice Request 425

Line	Status	Docu...	Product ID	Description	Quantity	List Price	Discou...	Net Price	Net Value	Invoic...
100	To Be Invoiced	Sales ...	CAROL_PBTM	Carol_service_time_material (proj...	2 wday	100,00 EUR		100,00 ...	200,00 ...	16.12...

Invoice: 1RE-334-2017

Status: **Released** Account: Carol Holdings Invoice Date: 16.12.2017 Total: 248,00 EUR

Release Save Close Preview New Cancel You Can Also Basic View

General **Items** Pricing Involved Parties Document Flow Changes Output History Feed

Line	Product ID	Description	Quantity	List Price	Discount (%)	Net Price
10	CAROL_PBTM	Carol_service_time_material ...	2 wday	100,00 EUR		100,00 EUR

Details: Product - CAROL_PBTM - Carol_service_time_material (project)

General Taxes Revenue Assignment

Main

Product ID: CAROL_PBTM
Description: Carol_service_time_material (project)

Reference

Employee Responsible: Robert Mann
Sales Unit: Vertrieb Heizungen

Since I've recorded 2 workdays in the time sheet, system counts this as 2 wdays and invoice the actual working time.

Back to respective Sales Order and found Invoice Status changed to In Process.

Sales Order: 3718

Status: **In Process** Account: Carol Holdings External Reference: Project: CPSO180 - 3718 Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR Total: 124,00 EU

Submit Save Close Preview New Copy Follow-Up Create Project Check Credit Limit You Can Al

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

Line	Product ID	Description	Quantity	List Price	Discount (%)	Net Price
10	CAROL_PBTM - Carol_service_time_material (project)	Carol_serv	1 wday	100,00 EUR		100,00 EUR

Details: Item Carol_service_time_material (project)

Details Taxes Notes Attachments

Item

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

Item Type: Service - time and material (project)
Description: Carol_service_time_material (project)
Posting Date: 16.12.2017
Requested Date: 21.12.2017 00:00 UK
Reason for Rejection:
Exchange:

Service

Working Condition:
Invoice Date: 16.12.2017

- 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	Last Invoiced On	Project ID	Project Name	Description
Finished	3718	Carol Holdings	16.12.2017	CPSO180	3718	

Details: Item Carol_service_time_material (project)

Details	Taxes	Notes	Attachments
Item			
Service Status:			
Delivery Status:	In Process		
Invoice Status:	Finished		
Item Type:	Service - time and material (project)		
Description:	Carol_service_time_material (project)		
Posting Date:	16.12.2017	1	
Requested Date:	21.12.2017	1	00:00 UK
Reason for Rejection:			
Exchange:			
Exchange/NetAmount:			
Exchange/Price/NetPrice/Amount:			

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

Maintain Project: 3718

3718
CPSO180

Status: **Completed** On Hold: **No** Start Date: **16.12.2017** Finish Date: **16.12.2017**

Save **Close** **New** **Valuate** **Download**

Project Plan Team and Staffing Products Sales Tracking Project Overview Feed

Gantt Chart Work Breakdown Structure Network Diagram

Show: **Basic** Add Delete Copy Expand Collapse

Name	ID	Duration	Person Responsible	Status
▼ 3718	CPSO180	1 Day(s)	Sandra Mohr	Completed
○ Carol_service_time_material (project)	CPSO180-1	1 Day(s)	Sandra Mohr	Completed
○	CPSO180-2	1 Day(s)		Completed

Sales Order has completed.

In the Sales Order, the finished delivery value will always show the original value regardless the actual time recording.

Sales Order: 3718

Status: **Completed** Account: Carol Holdings External Reference: Project: CPSO180 - 3718 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_PBTM - Carol_service_time_material (project)	Carol_serv		1 wday	100,00 EUR	100

Details: Item Carol_service_time_material (project)

Details	Taxes	Notes	Attachments
Item			
Service Status:			
Delivery Status:	Finished / 1 Working day(s)		
Invoice Status:	Finished		
Item Type:	Service - time and material (project)		
Description:	Carol_service_time_material (project)		
Posting Date:	16.12.2017	1	
Requested Date:	21.12.2017	1	00:00 UK

Service

Fulfillment: Internal

Working Condition:

Invoice Date: 16.12.2017

