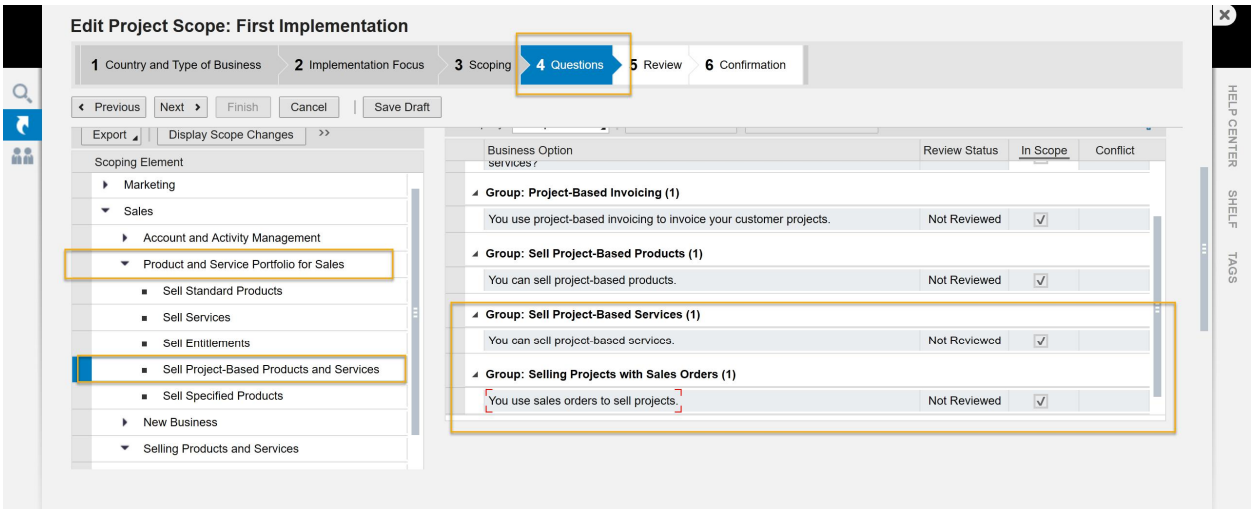
Sales Order –Service - time and material (project)

Prerequisite to do Project Based Service/Product:

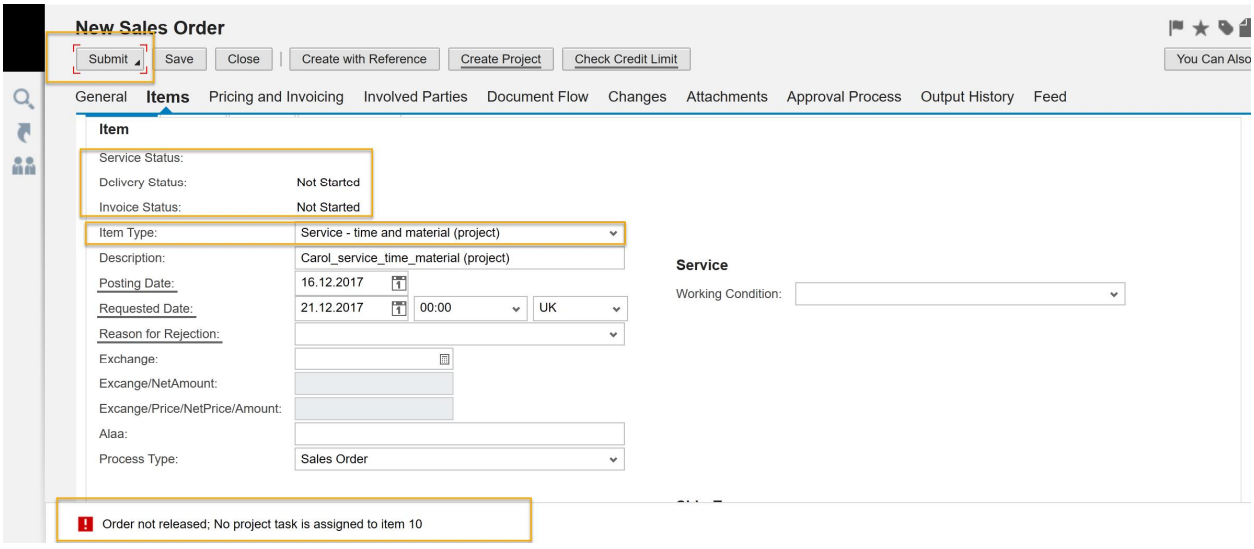
Edit Project Scope>Questions> Sales>Sell Project-Based Products and Services>Check question “You can sell project-based services.” And “You use sales orders to sell projects.”



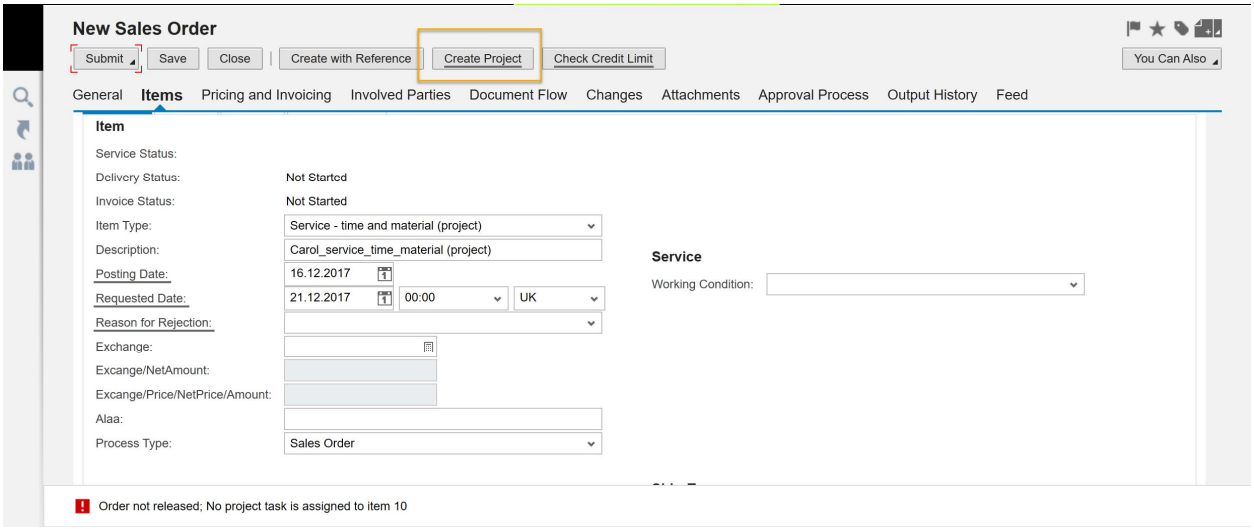
1. Release the Sales Order

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.

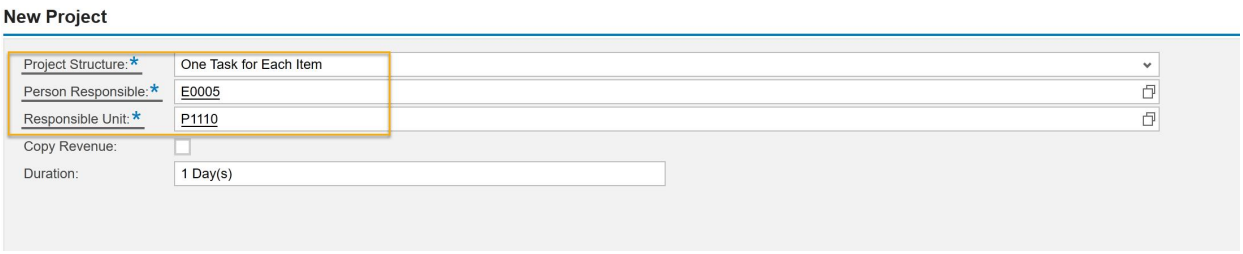
This is because a project based item has to have a project assigned to it.



2. Create Project



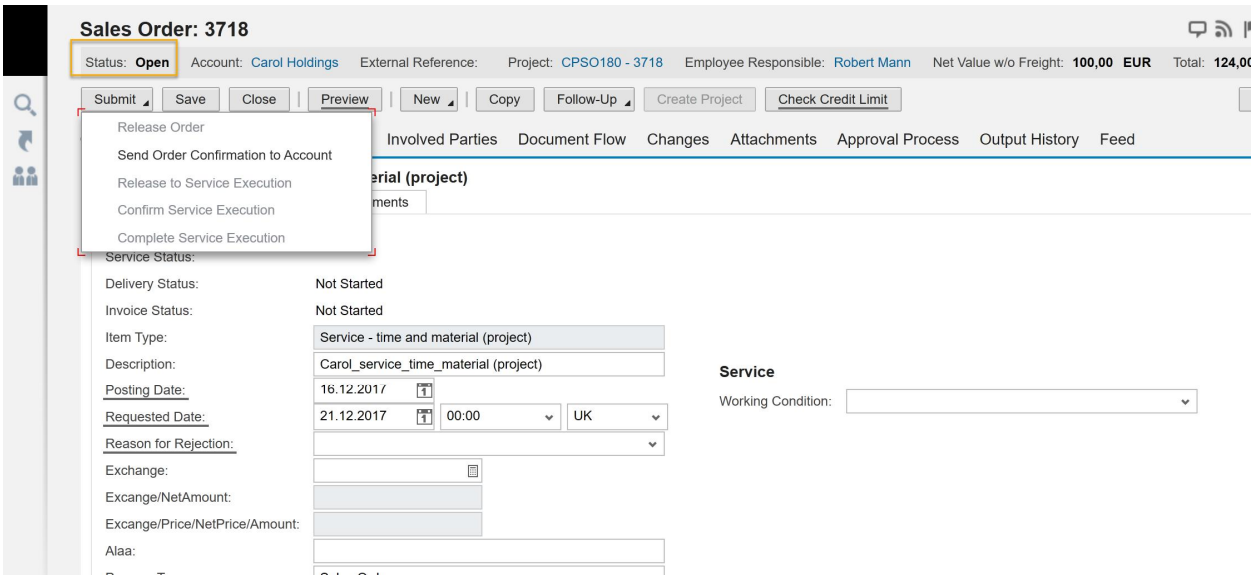
Input the necessary information to create the project.



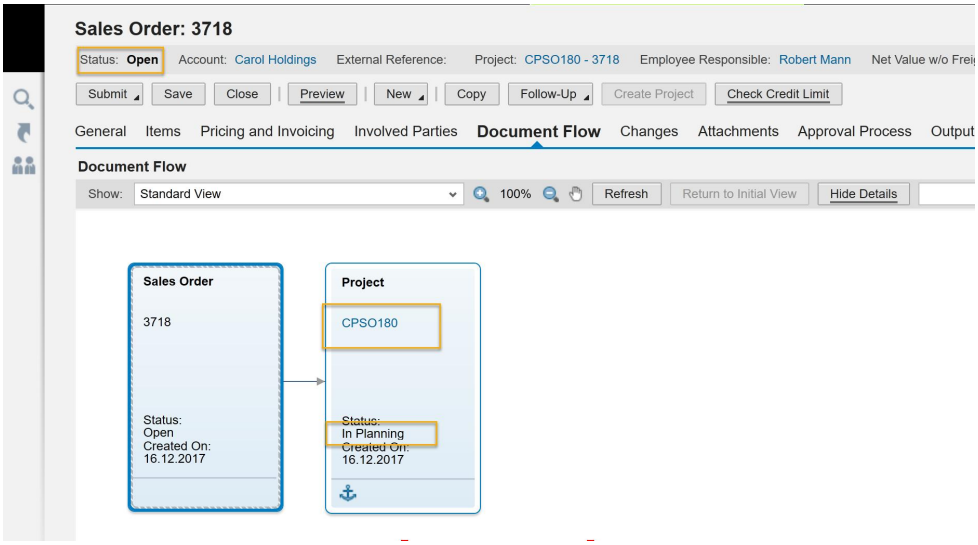
You will get information message “Project CPSO180 (3718) has been created. You can edit it as soon as you have saved the sales order.”

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.

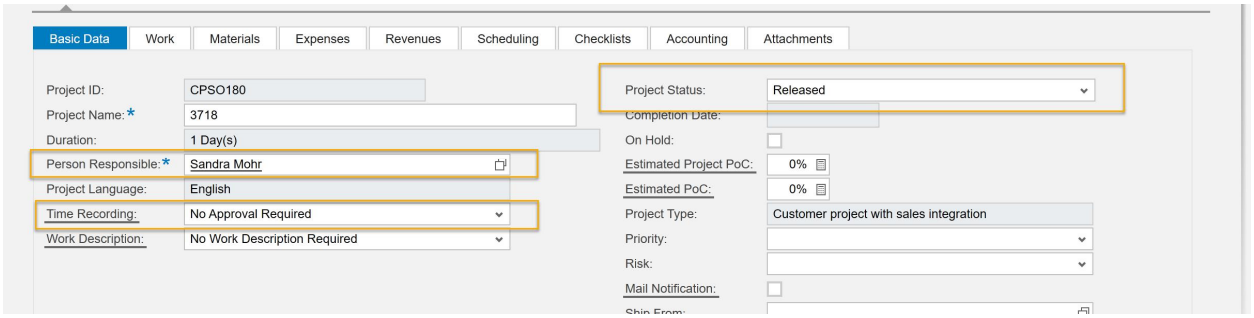


A project has been attached to the respective Sales Order with the Status In Planning.



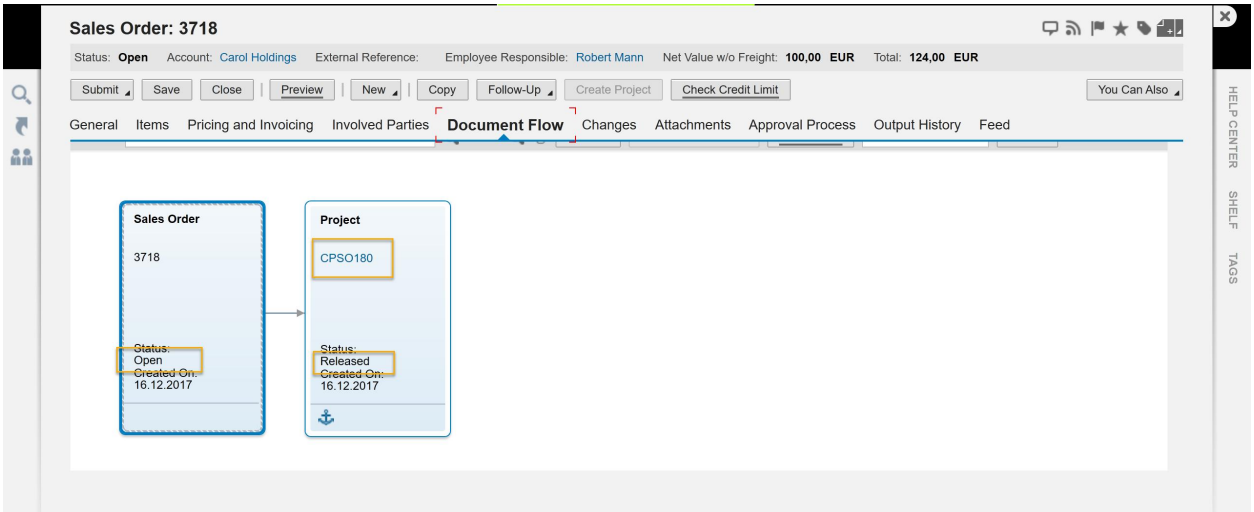
Since this item type is Project Based, you need to accomplish the Service through the Project.

3. Release Project.

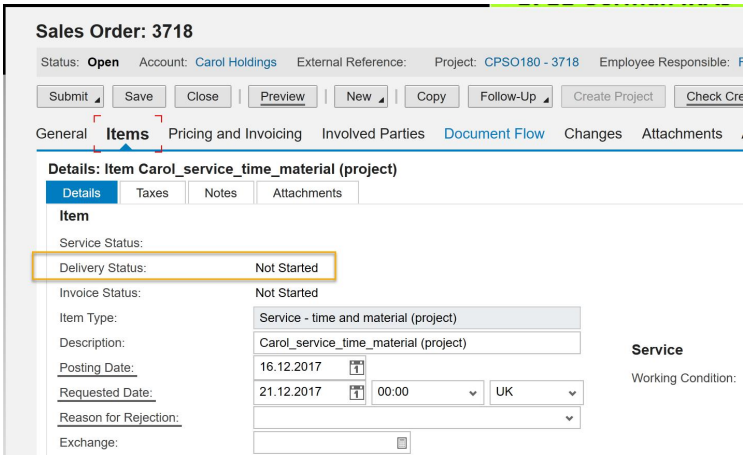


Back to the respective Sales Order's Document Flow.

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

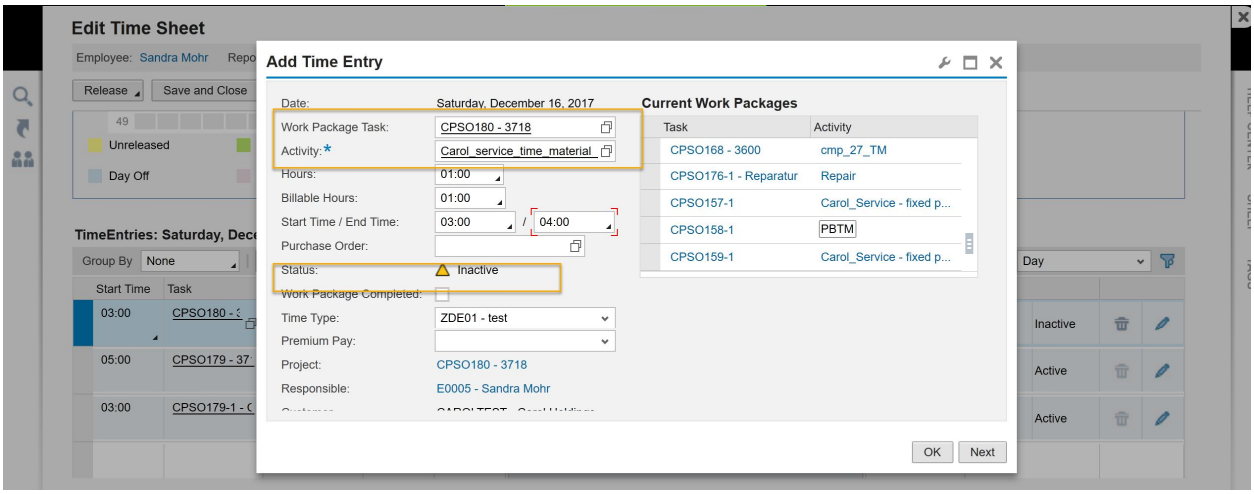


The Delivery Status on Item level remains Not Started.

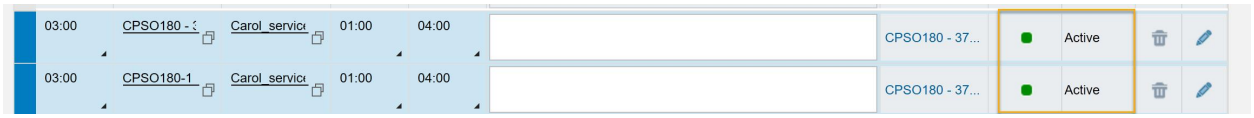


4. Maintain the time recording for the project .

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

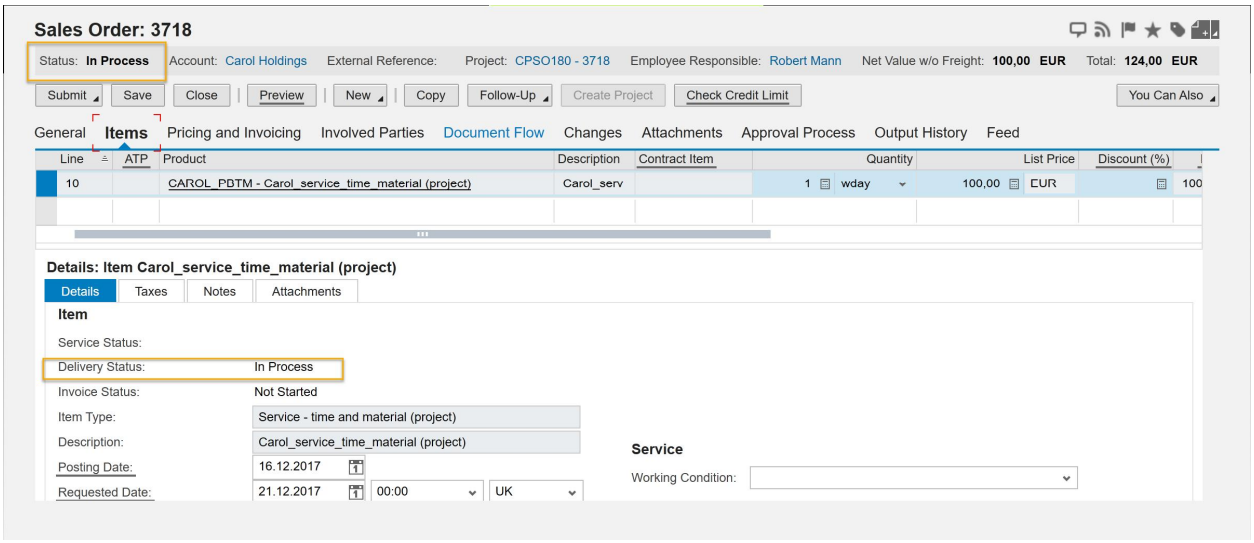


In this case, I recorded 2 work days which is *larger* than the value in Sales Order.

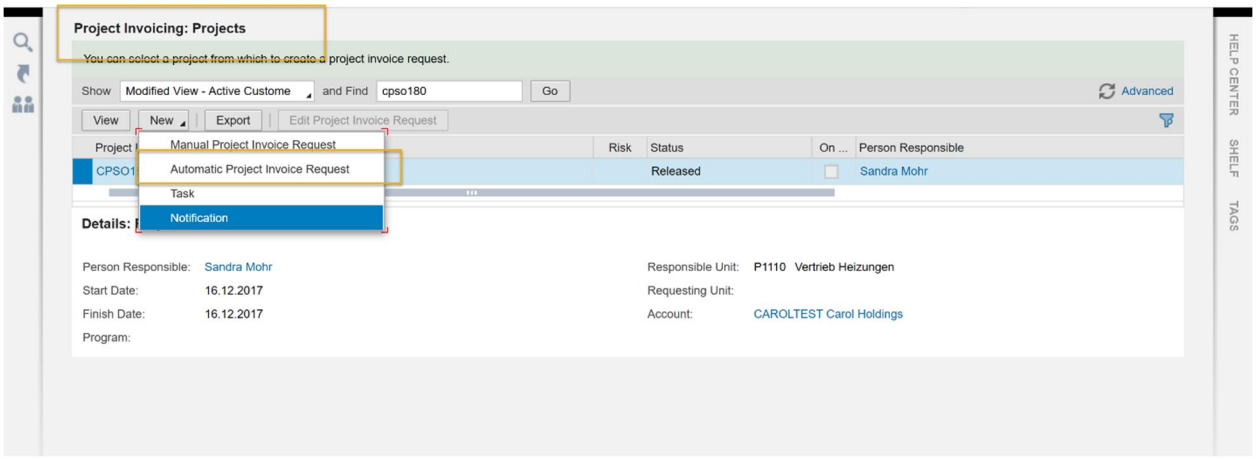


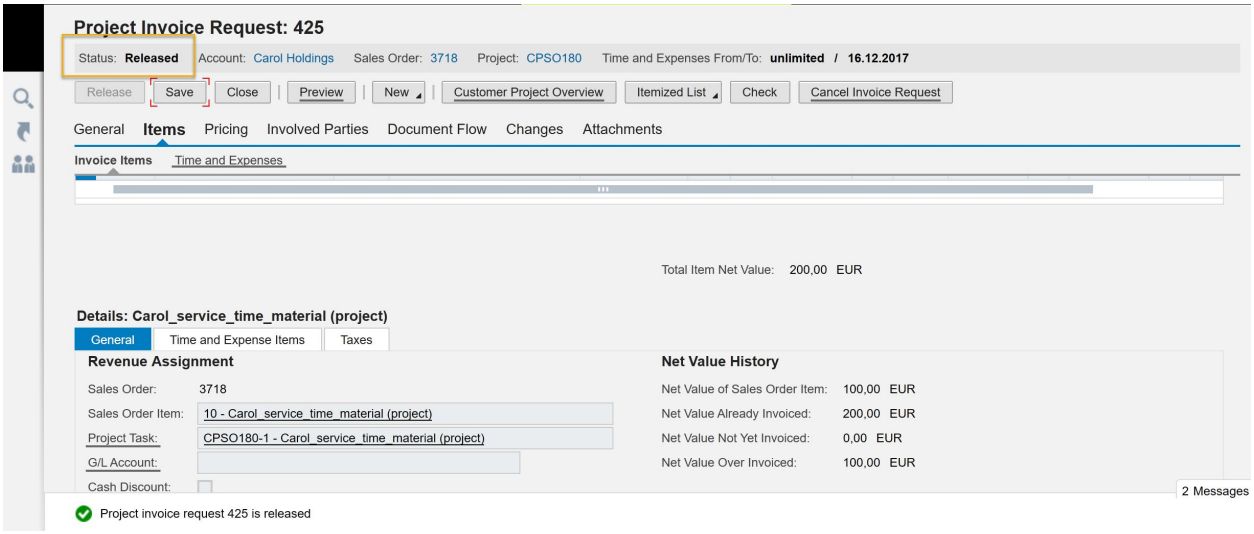
Back to respective Sales Order

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

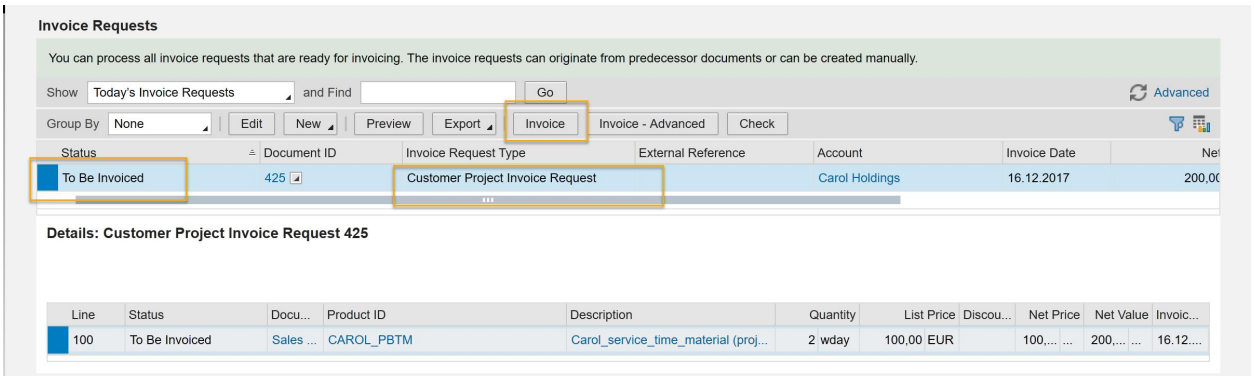


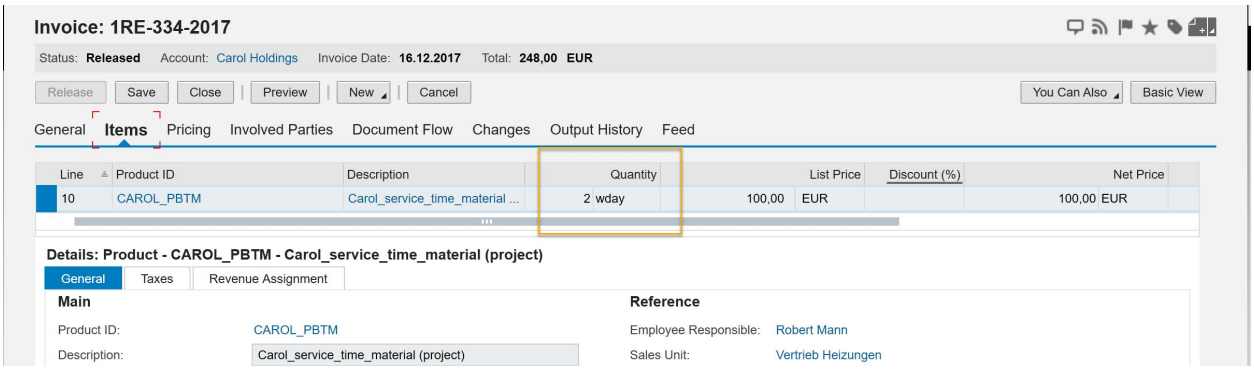
5. Generate Project invoice Request via Customer Invoicing WoC> Project Invoicing> Projects





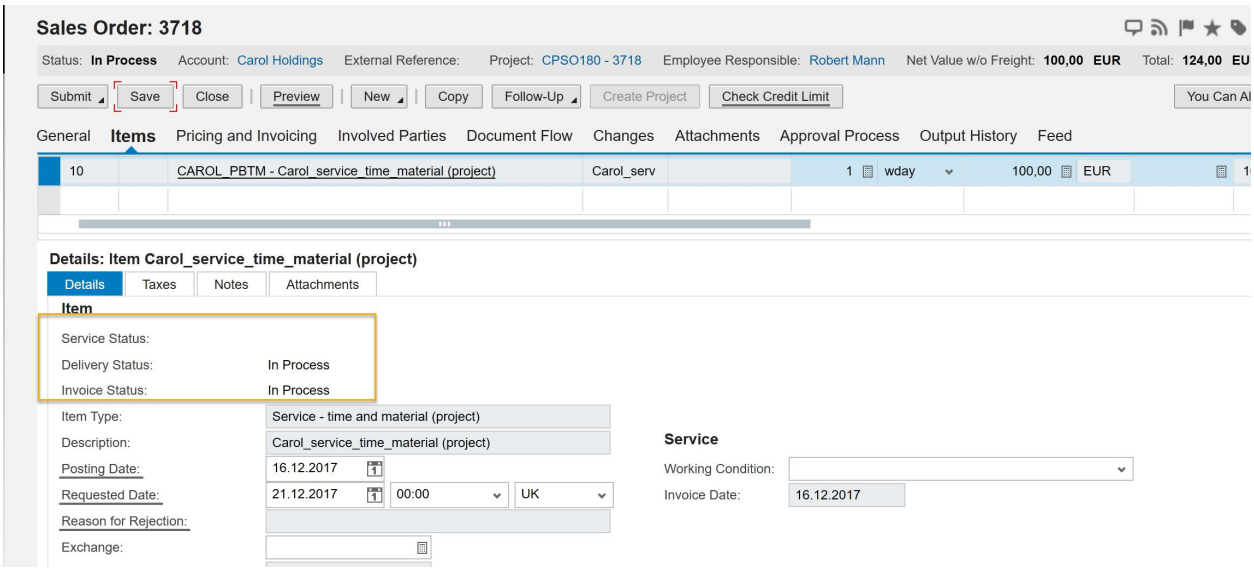
6. Invoice the Project Invoice Request.



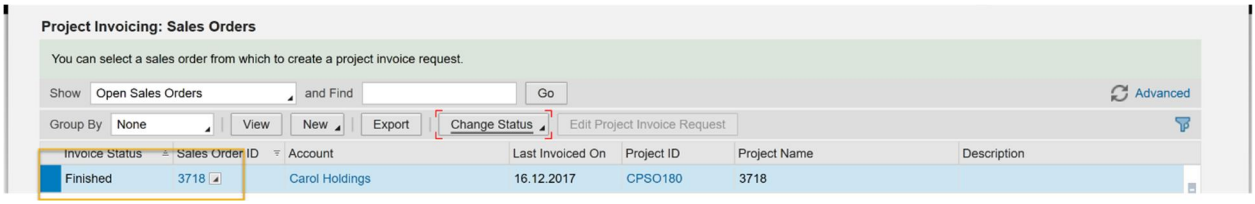


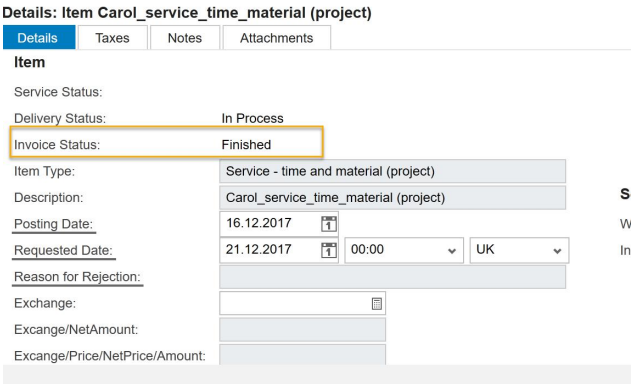
Since I've recorded 2 workdays in the time sheet, system counts this as 2 wdays and invoice the actual working time.

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

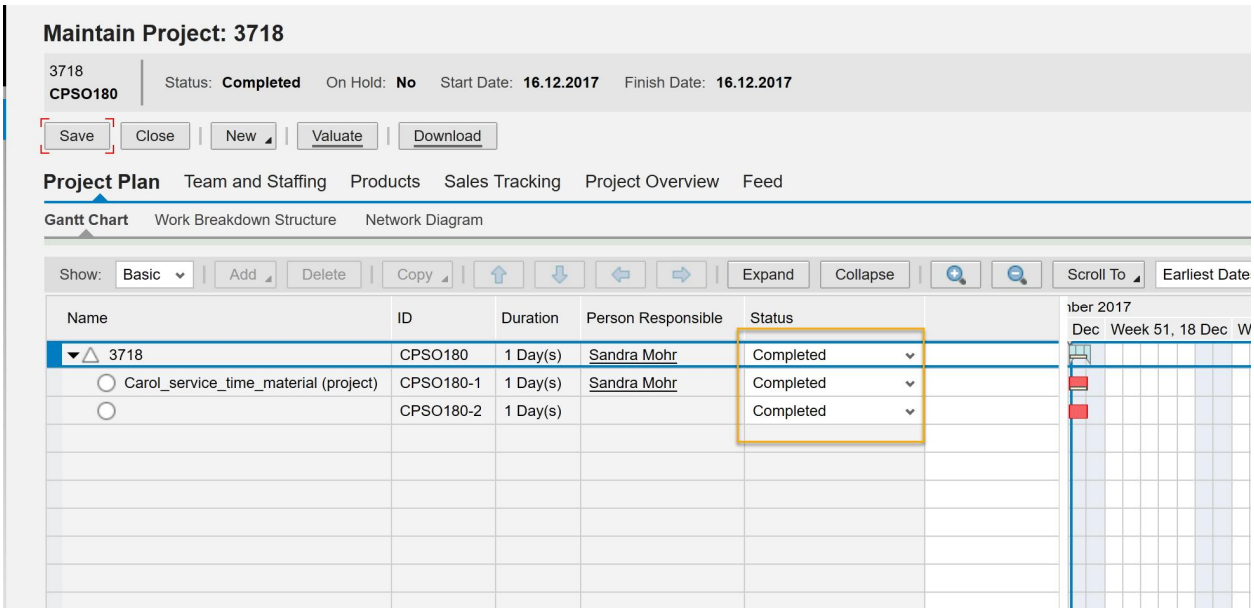


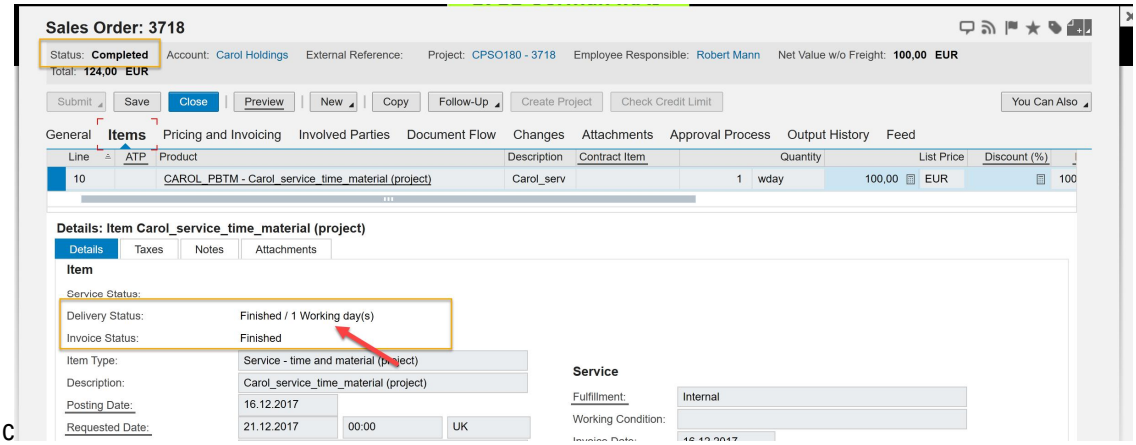
7. To make the invoice status to finished, you have to manually finish the invoicing in the project invoice> Sales Orders.





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



Sales Order has completed.

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