Sales Order --Service - time and material

Contents

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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	✓	
 Sales Orders 	(Crown: External Lober Becourses for Sales Orders (1)			
Customer Contracts	a Group. External Labor Resources for Sales Orders (1)			
 E-Selling 	Do you outsource service jobs?	Reviewed	<u> </u>	
Customer Returns				
Communication for Selling Products and Serv	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 the Service Order.

General Items Pricing and Ir	nvoicing Involved Parties Document Flow Cha	nges Attachments A	Approval Process	Output History Feed	
Details: Item Carol_Service - t Details Taxes Notes Item Service Status: Delivery Status:	ime and material Attachments Not Released Not Started				
Invoice Status:	Not Relevant Service - time and material	Service	Internal		
Description: Posting Date: Requested Date:	Carol_Service - time and material 13.12.2017	Service Performer: Labor Resource: Working Condition:	Sandra Mohr RES100		
Reason for Rejection: Exchange:	~	Duration: Supplier:	1 Hour(s)		

Status of Service Order changed from In Preparation to Open.

Sales Order: 3691					ロッ
Status: Open Account: Carol Hold	dings External Reference: Employee Responsit	le: Robert I	Mann Net Value w/o I	Freight: 50,00 EUR Total: 62,00	EUR
Submit J Save Close	Preview New Copy Follow-Up	Create F	Project Check Cred	dit Limit	
General Items Pricing and I	nvoicing Involved Parties Document Flow	Changes	s Attachments A	opproval Process Output Histor	ry Feed
Details: Item Carol_Service - 1	time and material				
Details Taxes Notes	Attachments				
Item					
Service Status:	Not Released				
Delivery Status:	Not Started				
Invoice Status:	Not Relevant		Service		
Item Type:	Service - time and material		Fulfillment	Internal	~
Description:	Carol_Service - time and material		Soprios Derformer:	Sandra Mahr	
Posting Date:	13.12.2017		Service Feriornier.		
Requested Date:	18.12.2017 1 00:00 ¥ ESTNO	~	Labor Resource:	RESTOD	Ľ
Reason for Rejection:		~	Working Condition:		~
Exchange:			Duration:	1 Hour(s)	
Excange/NetAmount:			Supplier:		đ
Excange/Price/NetPrice/Amount:					
Alaa:					
Process Type:	Sales Order	~			

2. Release to Service Execution.

Status of Sales Order changed from Open to In Process. Service Status changed to Released.

Sales Order: 3691			ロッマオット
Status: In Process Account: Car	Holdings External Reference: Employee Responsible: Robert Mann	Net Value w/o Freight: 50,00 EUR Total: 62,00 EUR	
Q Submit Save Close	Preview New Copy Follow-Up Create Project	neck Credit Limit	You Can Also 🖌
General Items Pricing and	voicing Involved Parties Document Flow Changes Attachme	ents Approval Process Output History Feed	
ññ			
	111		
Details: Item Carol_Service -	ime and material		
Details Taxes Notes	Attachments		
Item			
Service Status:	Released		
Delivery Status:	Not Started		
Invoice Status:	Not Relevant Service		
Item Type:	Service - time and material Fulfillment:	Internal	•
Description:	Carol_Service - time and material Service Per	former: Sandra Mohr	8
Posting Date:	13.12.2017 1 Labor Reso	urce: RES100	8
Requested Date:	18.12.2017 1 00:00 v ESTNO v Working Co	ndition:	*
Reason for Rejection:	✓ Duration:	1 Hour(s)	
Exchange: Excange/NetAmount:	Supplier:		đ

3. Click Confirm Service Execution from Sales Order.

Error message displayed: Copying referenced sales order item ID 3691-10 for service confirmation is not possible as it is enabled for time recording.

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.

Release A S	e Confirmation			You Can Also 🖌 View All
Account: Address: Contact: Phone: E-Mail: Subject:	Carol Holdings Rosenthaler Str. 31 10178 Berlin Address Details Germany Address Details Quernany Address Details Customerbyd@byd.com	Location of Service Provis Address:	sion: Rosenthaler Str. 31 10178 Berlin Germany	
Confirmation D	Description	Categorization		
Notes: Work Description:	Work Description Internal Note	Incident Category:		
		Executed By Service Performer	Sandra Mohr	ß

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 Repo	Add Time Entry				⊬ □ ×	
Release Save and Close 46 13 14 15 16 17 47 20 21 22 23 24 49 Unreleased Image: Compare the second se	Date: Work Package Task: Activity:* Hours: Start Time / End Time: Purchase Order: Status: Work Package Completed: Working Condition:	Wednesday, December 13, 3691-10 - Carol Service - Carol Service - time and r 01:00 03:00 / 04:00 04:00 03:00 / 04:00 04:0	Current Work Packages Task CPSO177-2 - Junior C 3691-10 - Carol_Servi CPSO155-1 CPSO168 - 3600 CPSO157-1	Activity Junior Consulting Carol_Service - time a. Carol_Service - fixed p cmp_27_TM Carol_Service - fixed p	····	
Group By None 🔒	Service Confirmation Quanity:	1 🖩 Each 🗸				Day
Start Time * Activity	Premium Pay:	~				
03:00 <u>Carol_Service -</u>	Responsible: Customer:	8000000019 - Anna Braun				Ŧ
PBTM Service						Ť
Master Service2				ОК	Next	ŵ
-					-	

Actions> Release

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

	Sales	Order: 3691		다 일
	Status:	In Process Account: Carol Hold	tings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 50,00 EUR Total: 62,00 EUR	
Q,	Submit	Save Close Prev	view New I Copy Follow-Up Create Project Check Credit Limit	
5	General	Items Pricing and Invoicir	ng Involved Parties Document Flow Changes Attachments Approval Process Output History Feed	I
ññ				
	г			
		Sales Order	Service Confirmation	
		3691	848	
	L	Status: In Process Created On: 13.12.2017	Status: Finished Created On- 13.12.2017	

5. Submit > Complete Service Execution

Delivery Status changed from In Process to Finished.

Invoice Status changed from Not Relevant to Not Started.

	Sales Order: 3691						日ッす
	Status: In Process Account: Ca	rol Holdings External Reference: Employee R	esponsible: Robert M	ann Net Value w	//o Freight: 50,00	EUR Total: 62,00 EUR	
Q.	Submit _ Save Close	Preview New Copy Follow-Up	▲ Create Project	Check Credit	Limit		<u>\</u>
5	General Items Pricing and	Invoicing Involved Parties Document Flo	v Changes At	tachments Ap	proval Process	Output History Feed	
åå	10 <u>CAROL_SEC</u>	CO - Carol_Service - time and material	Carol_Serv	<u>m</u>	1 ea	50,00 🗐 EUR	5
	Details: Item Carol_Service -	- time and material					
	Details Taxes Notes	Attachments					
	Item						
	Service Status:	Released					
	Delivery Status:	Finished / 1 Each					
	Involce Status:	Not Started	Sen	vice			
	Item Type:	Service - time and material	E del	liment			
	Description:	Carol_Service - time and material	Fulli	iment:	nternal		
	Posting Date:	13.12.2017	Serv	lice Performer:			
	Requested Date:	18.12.2017 🛐 00:00 🗸 ESTNO	↓ Labo	or Resource:	KES100		
	Reason for Rejection:		VVOr	king Condition:			
	Exchange:		Dura	ation: 1	Hour(s)		
Sales	Orders - 🙀 Sales	Order: 3691 🚽 📄 Edit Time Sheet	Sales Order C	Overview	Edit Project Scop	e: Fi	

6. Invoice the Service Confirmation

Status Document ID Invoice Request Type External Reference Account Invoice Du To Be Invoiced 848 a Service Confirmation Invoice Request Carol Holdings 13.12.201	Status Document ID Invoice Request Type External Reference Account Invoice Date To Be Invoiced 848 Service Confirmation Invoice Request Carol Holdings 13.12.2017	Group By	lone 🖌	Edit New 🖌	Preview Export Invoi	ce Invoice -	Advanced Check]		
To Be Invoiced 848 Service Confirmation Invoice Request 0 Carol Holdings 13.12.20	To Be Invoiced 848 Service Confirmation Invoice Request Carol Holdings 13.12.2017 Internation Invoice Request 848	Status		= Document ID	Invoice Request Type	E	xternal Reference	Account		Invoice Dat
Details: Service Confirmation Invoice Request 848	Details: Service Confirmation Invoice Request 848	To Be Invo	iced	848 🔳	Service Confirmation Invoi	ce Request		Carol Ho	oldings	13.12.2017
Line Status Docu Product ID Description Quantity List Price Discou Nat Price	Elle olado datas boda Hodatib	Details: Se	rvice Confirma	tion Invoice Reque	est 848					

Back to respective Sales Order

All the status stays in Finished.

							7
atus: Completed Account: Ca	rol Holdings Extern	al Reference:	Employee Responsib	e: Robert Mann Net Valu	e w/o Freight: 50,00	DEUR Total: 62,	00 EUR
Submit A Save Close	Preview	w 🖌 🛛 Copy	Follow-Up 🖌 Cr	eate Project Check Cre	dit Limit		
						0 I III I	
eneral Items Pricing and	Invoicing Invoive	ed Parties Do	ocument Flow Cha	anges Attachments A	Approval Process	Output History	Feed
Details: Item Carol Service -	time and materia	1					
Details Taxes Notes	Attachments						
Item	Attacimenta						
		1					
Service Status:	Released						
Delivery Status:	Finished / 1 Each						
Invoice Status:	Finished			Service			
Item Type:	Service - time and	material		Fulfillment:	Internal		
Description:	Carol_Service - tim	e and material		Service Performer:	Sandra Mohr		
Posting Date:	13.12.2017			Labor Resource:	RES100		
Requested Date:	18.12.2017	00:00	ESTNO	Working Condition:			
Reason for Rejection:				Duration:	1 Hour(s)		
Exchange:				Invoice Date:	13.12.2017		
Excange/NetAmount:				Supplier			
				Supplier.			
Excangenteranount.							

Without Time Recording Enabled:

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

Uncheck the question: Do you want to record time for sales orders?

1 Country and Type of Business 2 Implementation Focus	s 3 Scoping 4 Questions 5 Review 6 Confirmation	
Previous Next > Finish Cancel Save Dra	rft	
	order creation based on an availability check?	
New Business	✓ Group: External Labor Resources for Sales Orders (1)	
 Selling Products and Services 	Do you outsource service jobs? Reviewed	
Sales Orders	4 Group: Invoice Schedule for Sales Order (1)	
 Customer Contracts 		
 E-Selling 	Do you want to schedule invoices in sales orders? Reviewed	
Customer Returns	✓ Group: Sales Order Processing with Time Recording (1)	
Communication for Selling Products and Serv	Do you want to record time for sales orders? Reviewed	
 Analysis for Selling Products and Services 		
Customer Invoicing		
Sales Planning	Details: Sales Order Processing with Time Recording	
Service	Overview Relevance Dependency Your Notes	
 Sourcing 	Simulation	
Purchasing		
	Manually selecting this element will result in the system selections listed below.	

1. Release the Sales Order.

Sales Order: 3707						Ģ
Status: Open Account: Carol H	loldings External Refere	ence: Employee Responsit	le: Robert Mann Net Value	w/o Freight: 100,00 EU	R Total: 124,00 EU	R
Submit A Save Close	Preview	Copy Follow-Up	Create Project Chec	Credit Limit		
General Items Pricing an	d Invoicing Involved	Parties Document Flow	Changes Attachment	Approval Process	Output History F	eed
Details: Item Carol Service	- time and material					
Details Taxes Notes	Attachments					
Item						
Service Status:	Not Released					
Delivery Status:	Not Started					
Invoice Status:	Not Relevant		Service			
Item Type:	Service - time and ma	terial	Fulfilment	Internal		
Description:	Carol_Service - time a	and material	Funiment.	Candra Mahr		×
Posting Date:	14.12.2017		Service Perform	er: Sandra Monr		<u>P</u>
Requested Date:	19.12.2017	00:00 👻 UK	Labor Resource ✓	RES100		ם
Reason for Rejection:			✓ Working Condit	on:		*
Exchange:			Duration:	1 Hour(s)		
Excange/NetAmount			Supplier:			đ
Enterningenties anount.						

2. Release to Service Execution

The Status of Sales Order changed from Open to In Process.

Service Status is Released.

Sales Order: 3707				
Status: In Process Account	Carol Holdings External Reference:	mployee Responsible: Robert	Mann Net Value w/o Freight: 100,00	EUR Total: 124,00 EUR
Submit Save Close	Preview New A Copy	Follow-Up 🖌 Create Proje	Check Credit Limit	
General Items Pricing	and Invoicing Involved Parties Doc	ument Flow Changes	Attachments Approval Process	Output History Feed
Details: Item Carol_Serv	ce - time and material			
Details Taxes No	otes Attachments			
Item				
Service Status:	Released			
Delivery Status:	Not Started			
Invoice Status:	Not Relevant	5	onvico	
Item Type:	Service - time and material		ervice	
Description:	Carol Service - time and material	<u>FL</u>	Internal	*
Posting Date:	14.12.2017	Se	ervice Performer: Sandra Mohr	Ė
Requested Date:	19 12 2017	La	abor Resource: RES100	É
Requested Date.	13.12.2017	W W	orking Condition:	~
Reason for Relection		¥DI	uration: 1 Hour(s)	
Treason for Rejection.				
Exchange:		Su	upplier:	ć

3. Confirm Service Execution> Release Service Confirmation With Order Completion

Back to respective Sales Order> Document Flow

Service Confirmation based Invoice Request has been generated.

Delivery Status changed to Finished.

- If you release Service Confirmation Without Order Completion, you need to manually complete service in Sales Order.
- If you release Service Confirmation With Order Completion, the Complete Service Execution button will be grey out.

Account: Carol Holdings Close Preview Pricing and Invoicing Invoice Request 853	External Reference	Ce: Employee Responses Sopy Follow-Up Document Flow	Create Project Changes	lanr D
Close Preview Pricing and Invoicing Invoice Request 853	New C	Document Flow	Create Project Changes	Att
Pricing and Invoicing	Involved Parties	Document Flow	Changes	Att
Invoice Request 853				· · · · · · · · · · · · · · · · · · ·
Service Confirmation Invoice Request Created On: 15.12.2017 Service Confirmation 853 Status: Finished Created On: 15.12.2017 Status: Finished Created On: 15.12.2017 Status: Status: Finished Created On: 15.12.2017 Status:				
ol Holdings External Reference: Emplo	oyee Responsible: Robert Mann 1	Net Value w/o Freight: 100,00 EUR Tota	🖵 🗟	7 Im
Preview New Copy Fol	Ilow-Up 🖌 Create Project Ch	neck Credit Limit		Y
Released Finished / 1 Each Not Started Service - time and material Carol_Service - time and material	Int Flow Changes Attachme Service Fulfillment: Service Perf	Internal	tory Feed	
	Invoice Request Created On: 15.12.2017 Service Confirmation 853 Status: Finished Created On: 15.12.2017 Status: Finished Created On: 15.12.2017 New Copy Fo nvoicing Involved Parties Docume Released Finished/1 Each Not Started Service - time and material	Invoice Request Created On: 15.12.2017 * Service Confirmation 853 Status: Hinshed Created On: 15.12.2017 * Invoicing Involved Parties Document Flow Changes Attachmed Released Finished / 1 Each Not Started Service - time and material	Invoice Request Created On: 15.12.2017 Image: Status: Status: Timshed On: 15.12.2017 Image: Status: Terview: New Copy Follow-Up , Create Project Check Credit Limit Noticing Involved Parties Document Flow Changes Attachments Approval Process Output His Service Service - time and material	Invoice Request Created On: 15.12.2017 Image: Service Confirmation 853 Istus: Status: Created On: 15.12.2017 Istus: Created On: 15.12.2017 Istus: Created On: 15.12.2017 Istus: Created On: 15.12.2017 Itodings External Reference: Employee Responsible: Robert Mann Net Value wo Freight: 100.00 EUR Tereview New Copy Follow-Up Create Project Mex Gredi Limit nvoicing Involved Parties Document Flow Changes Attachments Approval Process Output History Feed Released Finished / 1 Each Not Started Service Service Internal

4. Invoice Service Confirmation Invoice Request.

Show Toda	ay's Invoice Requests	and Find	Go					C,	Advanced
Group By None _ Edit New Preview Export Invoice Invoice - Advanced Check									
Status		Document ID	Invoice Request Type	External Reference	Account		Invoice Date		Ne
To Be Invoiced 853 🖌		Service Confirmation Invoice F	Service Confirmation Invoice Request		Carol Holdings			100,0	
_									
Details: Se	ervice Confirmatio	on Invoice Request	853						
Details: Se	ervice Confirmatio	Docu Produce	853 t ID	Description	Quantity	List Price Disc	ou Net Price	Net Value	Invoic

5. Back to respective Sales Order.

The status of Sales Order changed to Completed as well as on the item level.

	Sales Order: 3707								日ッ言
	Status: Completed Account: Card	ol Holdings Extern	al Reference: En	nployee Responsible	e: Robert Mann Net Value	e w/o Freight: 100,00	EUR Total: 124	4,00 EUR	
Q,	Submit Save Close	Preview	Copy	Follow-Up 🖌 Cre	eate Project Check Cree	dit Limit			Y
5	General Items Pricing and I	nvoicing Involve	d Parties Docur	ment Flow Char	nges Attachments A	Approval Process	Output History	Feed	
66	Details Taxes Notes	Attachments							
	ltem								
	Service Status:	Released							
	Delivery Status:	Finished / 1 Each							
	Invoice Status:	Finished			Service				
	Item Type:	Service - time and r	naterial		Fulfillment:	Internal			
	Description:	Carol_Service - time	e and material		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:								
	Alaa:								
	Process Type:	Sales Order							