

Sales Order --Service - time and material

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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"/>	
<b>Group: External Labor Resources for Sales Orders (1)</b>			
Do you outsource service jobs?	Reviewed	<input checked="" type="checkbox"/>	
<b>Group: Invoice Schedule for Sales Order (1)</b>			
Do you want to schedule invoices in sales orders?	Reviewed	<input checked="" type="checkbox"/>	
<b>Group: Sales Order Processing with Time Recording (1)</b>			
Do you want to record time for sales orders?	Reviewed	<input checked="" type="checkbox"/>	

1. Release the Service Order.

**New Sales Order**

Submit Save Close Create with Reference 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 - time and material**

Details Taxes Notes Attachments

**Item**

Service Status: Not Released

Delivery Status: Not Started

Invoice Status: Not Relevant

Item Type: Service - time and material

Description: Carol\_Service - time and material

Posting Date: 13.12.2017

Requested Date: 18.12.2017 00:00 ESTNO

Reason for Rejection:

Exchange:

Exchange/NetAmount:

Exchange/Price/NetPrice/Amount:

Alaa:

**Service**

Fulfillment: Internal

Service Performer: Sandra Mohr

Labor Resource: REG100

Working Condition:

Duration: 1 Hour(s)

Supplier:

Status of Service Order changed from In Preparation to Open.

**Sales Order: 3691**

Status: **Open** Account: Carol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 50,00 EUR Total: 62,00 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 - time and material**

Details Taxes Notes Attachments

**Item**

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

Item Type: Service - time and material  
 Description: Carol\_Service - time and material  
 Posting Date: 13.12.2017  
 Requested Date: 18.12.2017 00:00 ESTNO  
 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)  
 Supplier:

## 2. Release to Service Execution.

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

**Sales Order: 3691**

Status: **In Process** Account: Carol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 50,00 EUR Total: 62,00 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

**Details: Item Carol\_Service - time and material**

Details Taxes Notes Attachments

**Item**

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

Item Type: Service - time and material  
 Description: Carol\_Service - time and material  
 Posting Date: 13.12.2017  
 Requested Date: 18.12.2017 00:00 ESTNO  
 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)  
 Supplier:

## 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.

**New Service Confirmation**

Release Save Close

You Can Also View All

Account: Carol Holdings

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

Contact: Anna Braun

Phone:

E-Mail: customerbyd@byd.com

Subject:

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

**Confirmation Description**

Notes: ☒ Work Description ☐ Internal Note

Work Description:

**Categorization**

Incident Category:

**Executed By**

Service Performer: Sandra Mohr

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

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

46 13 14 15 16 17  
47 20 21 22 23 24  
48 27 28 29 30  
49

Unreleased

Day Off

**TimeEntries: Wednesday, D**

Group By: None

Start Time Activity

03:00 Carol\_Service -

PBTM Service

Master Service

**Add Time Entry**

Date: Wednesday, December 13, ...

Work Package Task: 3691-10 - Carol\_Service -

Activity: Carol\_Service - time and r

Hours: 01:00

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

Purchase Order:

Status: Inactive

Work Package Completed: ☐

Working Condition:

Service Confirmation Quantity: 1 Each

Premium Pay:

Responsible:

Customer: 8000000019 - Anna Braun

**Current Work Packages**

Task	Activity
CPSO177-2 - Junior C...	Junior Consulting
3691-10 - Carol_Servi...	Carol_Service - time a...
CPSO155-1	Carol_Service - fixed p...
CPSO168 - 3600	cmp_27_TM
CPSO157-1	Carol_Service - fixed n...

OK Next

Actions> Release

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

**Sales Order: 3691**

Status: **In Process** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **50,00 EUR** Total: **62,00 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

The diagram illustrates the document flow from a Sales Order to a Service Confirmation. The Sales Order (3691) is currently in 'In Process' status. It leads to a Service Confirmation (848), which is in 'Finished' status and was 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**

Status: **In Process** Account: **Carol Holdings** External Reference: Employee Responsible: **Robert Mann** Net Value w/o Freight: **50,00 EUR** Total: **62,00 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

Item	Description	Unit	Quantity	Price	Total
10	CAROL_SECO - Carol_Service - time and material	ea	1	50,00 EUR	50,00 EUR

**Details: Item Carol\_Service - time and material**

Details Taxes Notes Attachments

**Item**

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

Item Type: Service - time and material  
 Description: Carol\_Service - time and material  
 Posting Date: 13.12.2017  
 Requested Date: 18.12.2017 00:00 ESTNO  
 Reason for Rejection:  
 Exchange:

**Service**

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

## 6. Invoice the Service Confirmation

Go Reset Save Query Organize Queries

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	848	Service Confirmation Invoice Request		Carol Holdings	13.12.2017

**Details: Service Confirmation Invoice Request 848**

Line	Status	Docu...	Product ID	Description	Quantity	List Price	Discou...	Net Price	Net Value
10	To Be Invoiced	Sales ...	CAROL_SECO	Carol_Service - time and material	1 ea	50,00 E...		50,00 ...	50,00 ...

Back to respective Sales Order

All the status stays in Finished.

**Sales Order: 3691**

Status: **Completed** Account: Carol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 50,00 EUR Total: 62,00 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 - time and material**

Details Taxes Notes Attachments

**Item**

Service Status: Released  
 Delivery Status: Finished / 1 Each  
 Invoice Status: Finished

Item Type: Service - time and material  
 Description: Carol\_Service - time and material  
 Posting Date: 13.12.2017  
 Requested Date: 18.12.2017 00:00 ESTNO  
 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: 13.12.2017  
 Supplier:

Orders Sales Order: 3691 Invoice Overview: 1R... Service Confirmation ...

## 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?

**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

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

Sourcing

Purchasing

Product Development

Group: External Labor Resources for Sales Orders (1)

Do you outsource service jobs? Reviewed ☒

Group: Invoice Schedule for Sales Order (1)

Do you want to schedule invoices in sales orders? Reviewed ☒

Group: Sales Order Processing with Time Recording (1)

Do you want to record time for sales orders? Reviewed ☐

Details: Sales Order Processing with Time Recording

Overview Relevance Dependency Your Notes

Simulation

Manually selecting this element will result in the system selections listed below.

1. Release the Sales Order.

**Sales Order: 3707**

Status: Open Account: Carol Holdings External Reference: 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

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

Details: Item Carol\_Service - time and material

Details Taxes Notes Attachments

Item

Service Status: Not Released

Delivery Status: Not Started

Invoice Status: Not Relevant

Item Type: Service - time and material

Description: Carol\_Service - time and material

Posting Date: 14.12.2017

Requested Date: 19.12.2017 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)

Supplier:

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: 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

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

**Details: Item Carol\_Service - time and material**

Details Taxes Notes Attachments

**Item**

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

Item Type: Service - time and material  
 Description: Carol\_Service - time and material  
 Posting Date: 14.12.2017  
 Requested Date: 19.12.2017 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)  
 Supplier:

### 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.

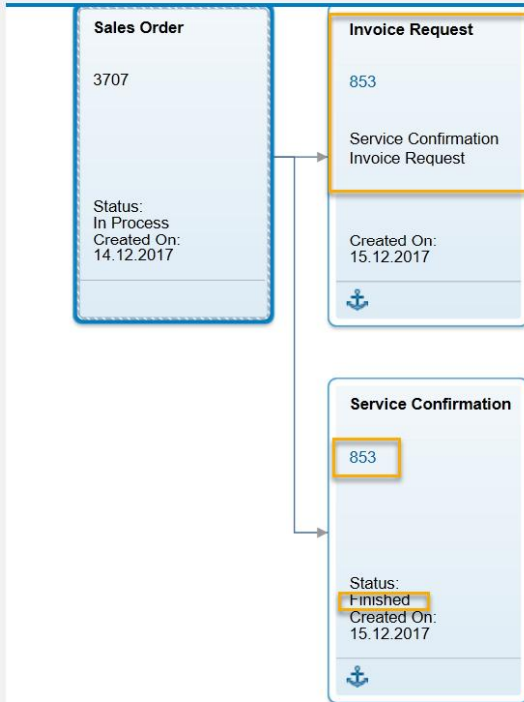


## Sales Order: 3707

Status: **In Process** Account: [Carol Holdings](#) External Reference: Employee Responsible: [Robert Mann](#)

[Submit](#) [Save](#) [Close](#) | [Preview](#) | [New](#) | [Copy](#) [Follow-Up](#) [Create Project](#)

[General](#) [Items](#) [Pricing and Invoicing](#) [Involved Parties](#) **[Document Flow](#)** [Changes](#) [Att](#)



## Sales Order: 3707

Status: **In Process** Account: [Carol Holdings](#) External Reference: 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](#)

[General](#) **[Items](#)** [Pricing and Invoicing](#) [Involved Parties](#) [Document Flow](#) [Changes](#) [Attachments](#) [Approval Process](#) [Output History](#) [Feed](#)

### Item

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

Item Type: Service - time and material  
Description: Carol\_Service - time and material  
Posting Date: 14.12.2017  
Requested Date: 19.12.2017 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)  
Supplier:

### Cost and Revenue Assignment

### Ship-To

#### 4. Invoice Service Confirmation 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	853	Service Confirmation Invoice Request		Carol Holdings	15.12.2017	100,00

**Details: Service Confirmation Invoice Request 853**

Line	Status	Docu...	Product ID	Description	Quantity	List Price	Discou...	Net Price	Net Value	Invoic...
10	To Be Invoiced	Sales ...	CAROL_SECO	Carol_Service - time and material	1 ea	100,00 EUR		100,00	100,00	

#### 5. Back to respective Sales Order.

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

**Sales Order: 3707**

Status: **Completed** Account: Carol Holdings External Reference: 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

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

**Details** Taxes Notes Attachments

**Item**

Service Status:	Released
Delivery Status:	Finished / 1 Each
Invoice Status:	Finished
Item Type:	Service - time and material
Description:	Carol_Service - time and material
Posting Date:	14.12.2017
Requested Date:	19.12.2017 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:	14.12.2017
Supplier:	