

Sales Order --Service - time and material

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

Export | Display Scope Changes >>

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 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:

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

Contact: Anna Braun
 Phone:
 E-Mail: customerbyd@byd.com
 Subject:

Confirmation Description **Categorization**
 Notes: Work Description Internal Note
 Work Description: 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 Service2

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

```

    graph LR
      SO[Sales Order 3691] --> SC[Service Confirmation 848]
      subgraph SO_Details [Sales Order 3691]
        SO_S[Status: In Process]
        SO_C[Created On: 13.12.2017]
      end
      subgraph SC_Details [Service Confirmation 848]
        SC_S[Status: Finished]
        SC_C[Created On: 13.12.2017]
      end
  
```

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	Currency	...
10	CAROL_SECO - Carol_Service - time and material	Carol_Serv	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
 Invoice Status: Not Started

Service

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:

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

6. Invoice the Service Confirmation

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

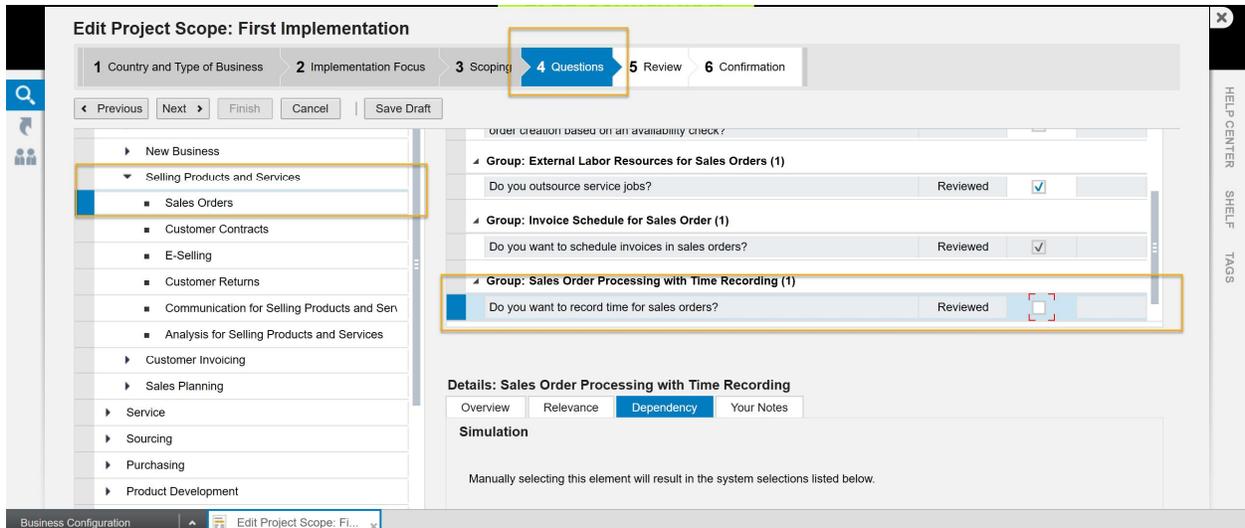
Fulfillment: Internal
 Service Performer: Sandra Mohr
 Labor Resource: RES100
 Working Condition:
 Duration: 1 Hour(s)
 Invoice Date: 13.12.2017
 Supplier:

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

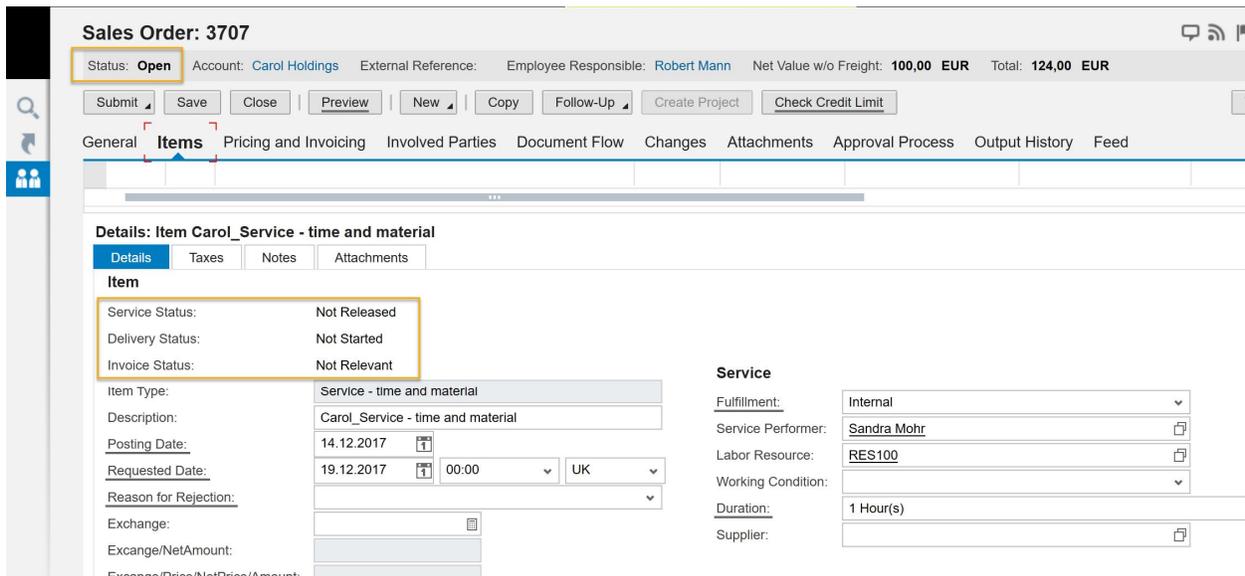
Without Time Recording Enabled:

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

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



1. Release the Sales Order.



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.

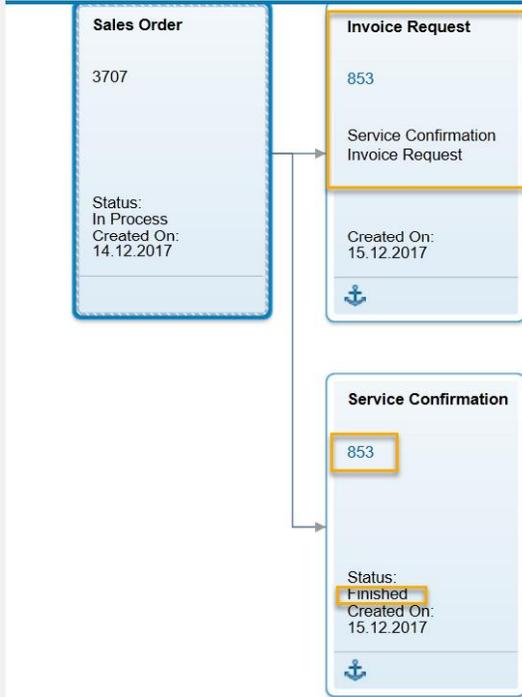
- If you release Service Confirmation Without Order Completion, you need to manually complete service in Sales Order.
- If you release Service Confirmation With Order Completion, the Complete Service Execution button will be grey out.

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 Assianment

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

Service

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

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