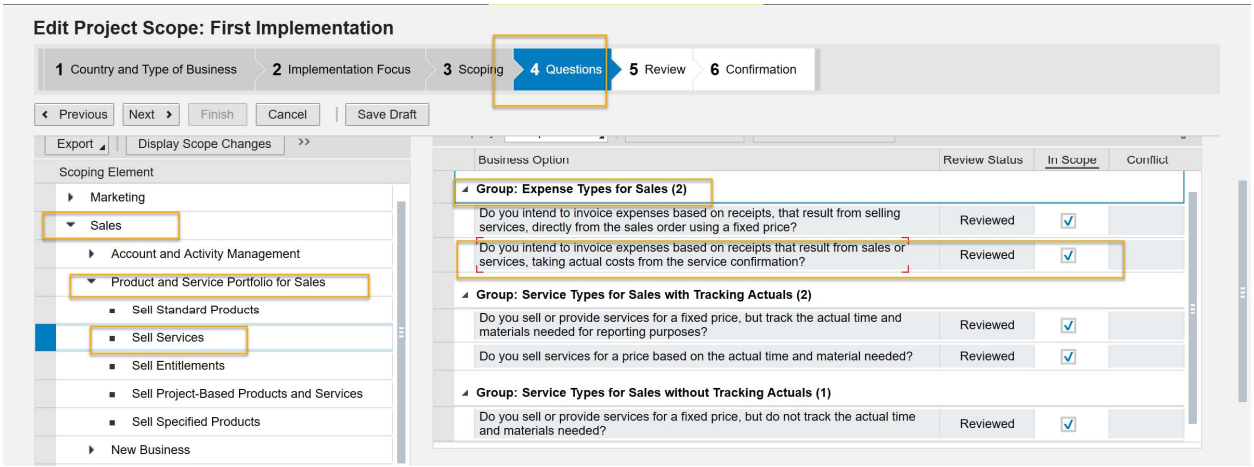
Sales Order-- Expense - time and material

Pre-requisite to do Service item with Expense type in Sales Order.

Edit Project Scope>Questions> Sales> Sell Services> Check question:

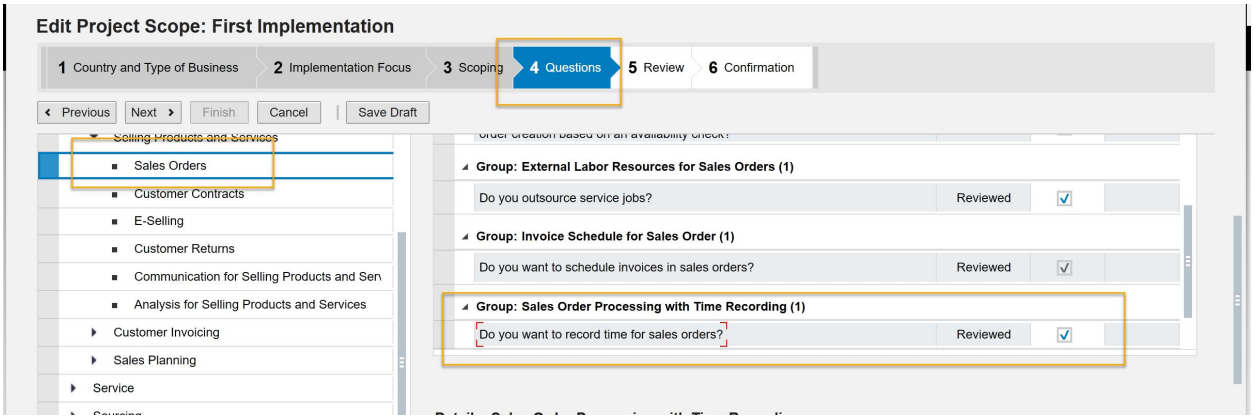
Do you intend to invoice expenses based on receipts that result from sales or services, taking actual costs from the service confirmation?



You have Time Recording Enabled in your tenant:

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

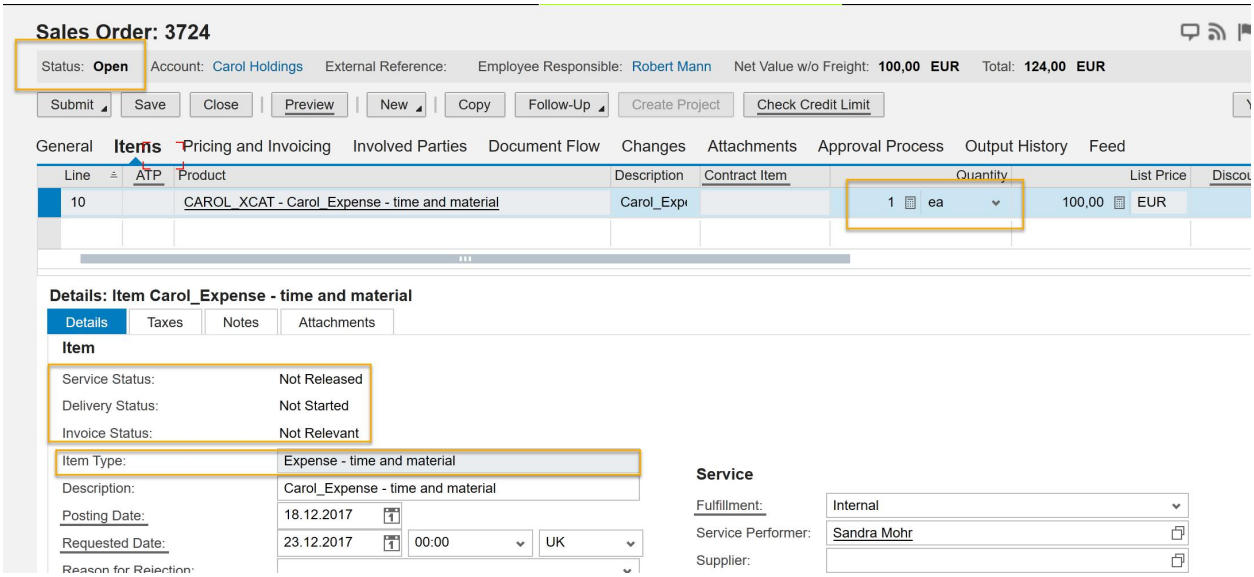
Question: Do you want to record time for sales orders?



1. Release Sales Order

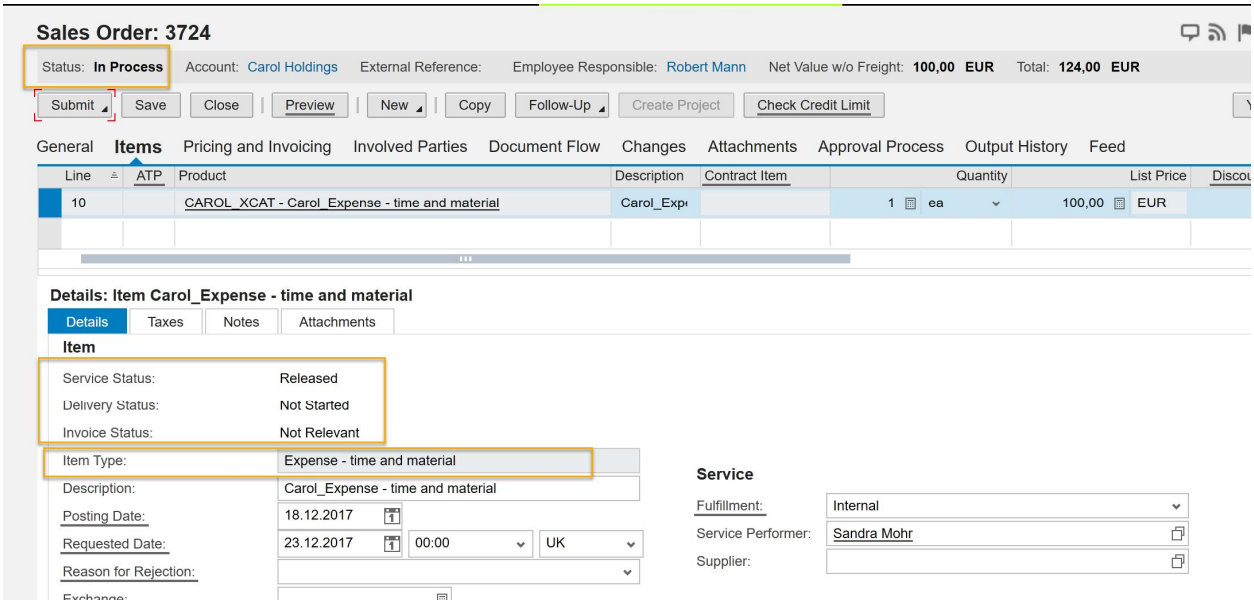
The Status of Sales Order changed to Open.

Quantity : 1 ea



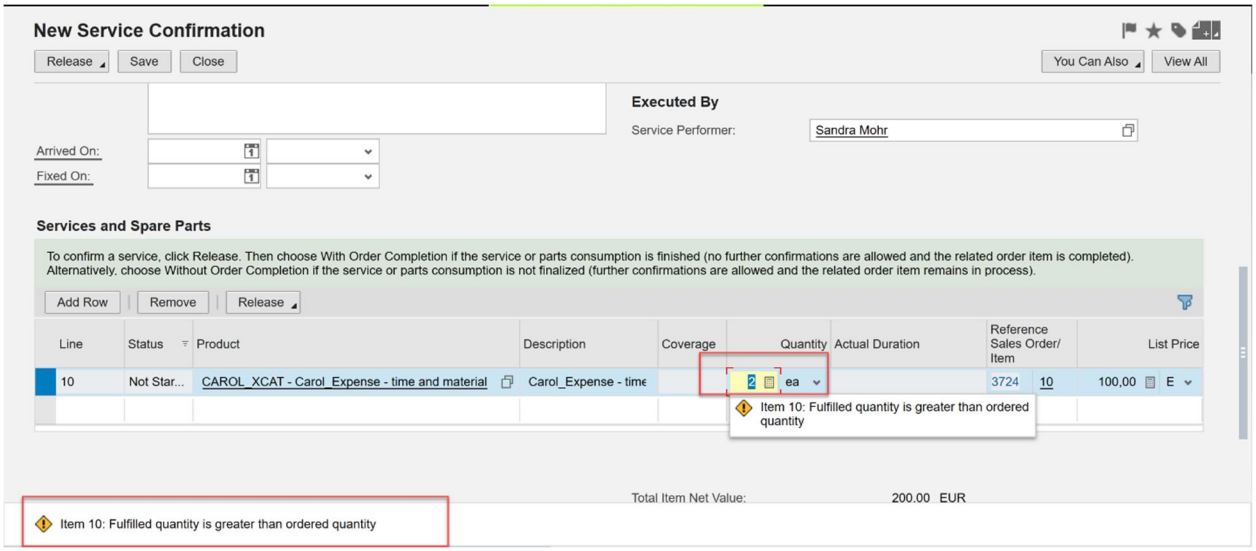
2. Release to Service Execution.

The Status of Sales Order changed to In Process.



3. You want to Confirm Service Execution directly from Sales Order

In this case, I entered the actual quantity as 2 and system will throw the warning message as" Item 10: Fulfilled quantity is greater than ordered quantity".



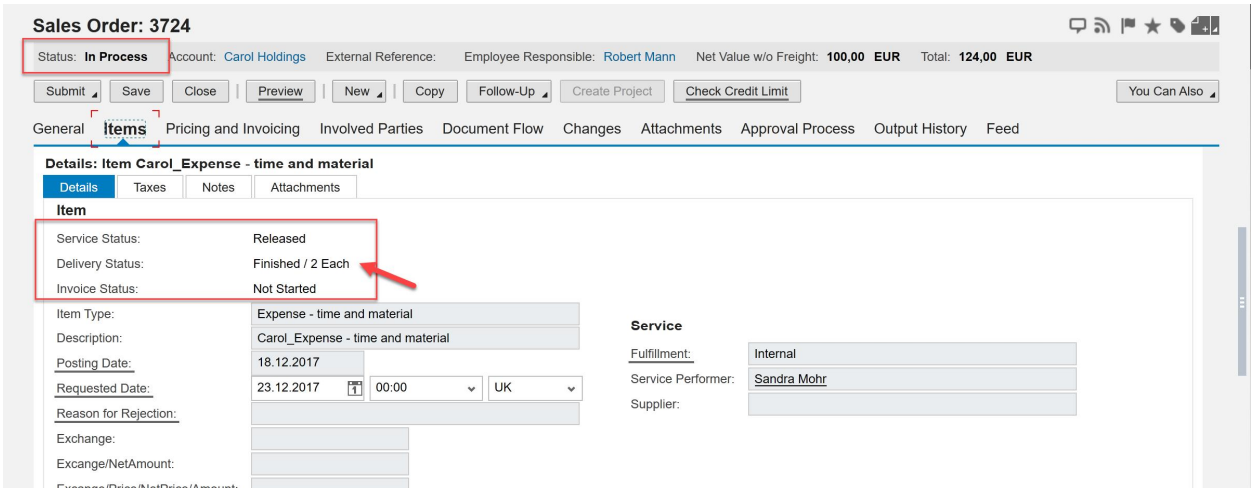
4. Release Service Confirmation with Order Completion.

Back to the respective Sales Order.

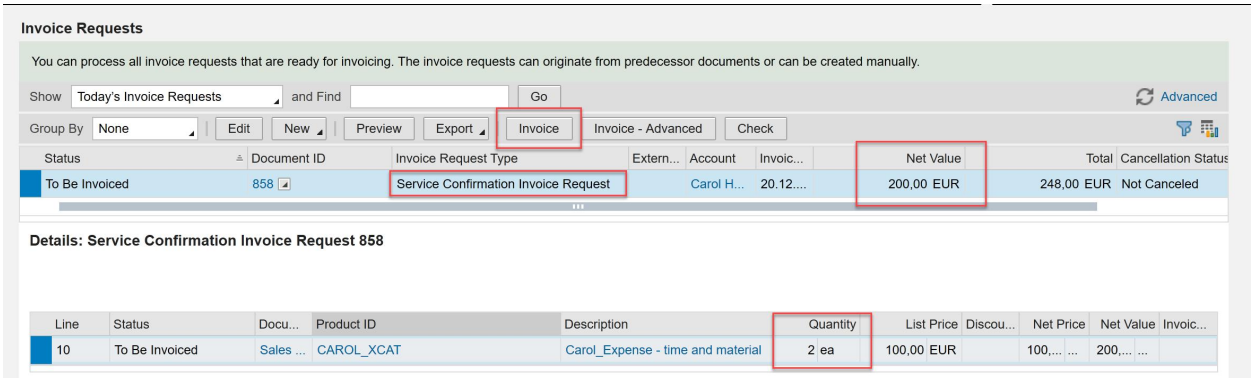
On item details, system recorded the actuals instead of initial value.

And the Delivery Status changed to Finished.

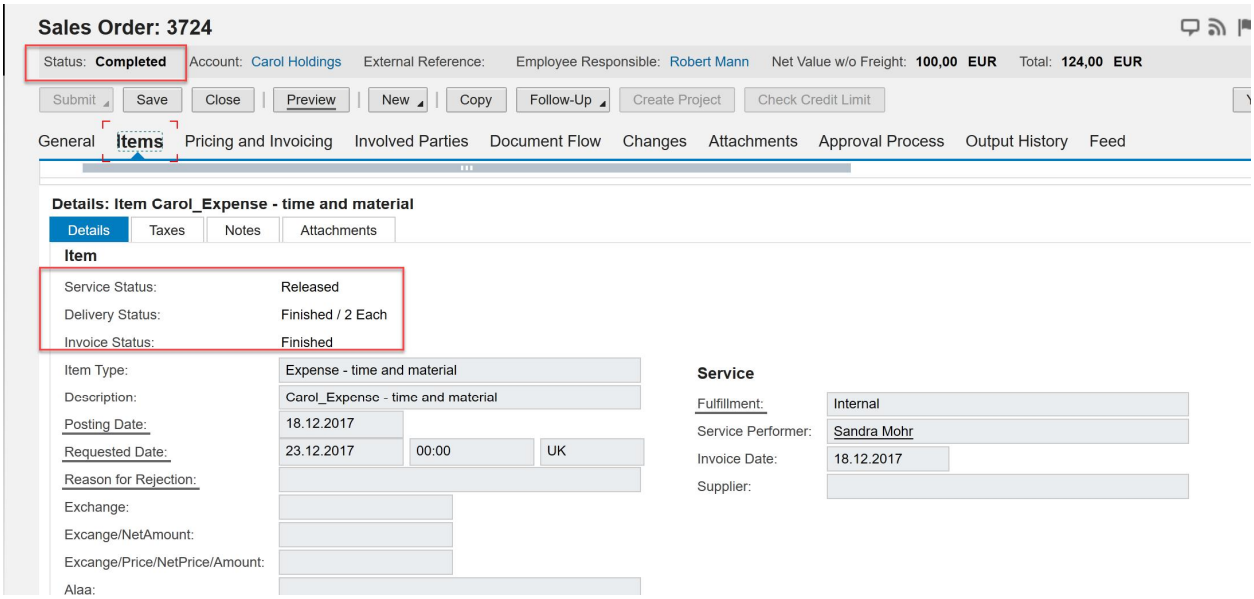
Invoice Status changed from Not Relevant to Not Started.



5. Invoice Service Confirmation based on actuals.



The Status of Sales Order changed to Completed with completed status on item level as well.



Note: Different from SECO - Service - time and material, Time Recording won't affect the completion of Service Confirmation when item type is Expense - time and material.