Sales Order -- Expense - fixed price without actuals

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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 selling services, directly from the sales order using a fixed price?

1 Country and Type of Business 2 Implementation Focus	3 Scoping 4 Questions 5 Review 6 Confirmation							
Previous Next Finish Cancel Save Draft								
Show All Elements	Questions for Sell Services							
Export Display Scope Changes	Group By Group Set as Reviewed Set as Not Reviewed			7				
Scoping Element	Business Option	Review Status	In Scope	Conflict				
Marketing	▲ Group: Expense Types for Sales (2)							
▼ Sales	Do you intend to invoice expenses based on receipts, that result from selling services, directly from the sales order using a fixed price?	Reviewed	v					
Account and Activity Management	Do you intend to invoice expenses based on receipts that result from sales or services, taking actual costs from the service confirmation?	Reviewed	v					
Product and Service Portfolio for Sales								
Sell Standard Products Sell Services	Do you sell or provide services for a fixed price, but track the actual time and materials needed for reporting purposes?	Reviewed	✓					
Sell Entitlements	Do you sell services for a price based on the actual time and material needed?	Reviewed	✓					
 Sell Project-Based Products and Services 	▲ Group: Service Types for Sales without Tracking Actuals (1)							
 Sell Specified Products 	Do you sell or provide services for a fixed price, but do not track the actual time and materials needed?	Reviewed	V					

Without Service Confirmation:

1. Release Sales Order

The Status of Sales Order changed to Open.

ales Order: 3722						ワ
atus: Open Account: Ca	rol Holdings External Ref	erence: Employee Responsible	e: Robert Mann Net Value w	/o Freight: 100,00 EU	R Total: 124,00 E	UR
Submit A Save Clos	e Preview New	V 🖌 Copy Follow-Up 🖌	Create Project Check C	redit Limit		[
neral Items Pricing	and Invoicing Involve	d Parties Document Flow	Changes Attachments	Approval Process	Output History	Feed
etails: Item Carol_Exp	fixed price without ac	tuals				
	lotes Attachments					
Item						
Service Status:	Not Released					
Delivery Status:	Not Started					
Invoice Status:	Not Started					
Item Type:	Expense - fixed price	e without actuals	0 miles			
Description:	Carol_Exp_fixed pr	ce without actuals	Service			
Posting Date:	18.12.2017		Fulfillment:	Internal		*
Requested Date:	23.12.2017	00:00 🖌 UK	 Service Performer: 	Sandra Mohr		đ
Reason for Rejection:			v Supplier:			đ
Exchange:						
Excange/NetAmount:						
Excongo/Brico/NotBrico/Am	aunt					

2. Release to Service Execution.

The Status of Sales Order changed to In Process.

Service Status changed to Released.

Sales Order: 3722				ロシー
Status: In Process Account: Car	ol Holdings External Reference: Employee Responsible: R	Robert Mann Net Valu	ue w/o Freight: 100,00 EUR Total: 124,00 EUR	
Submit 🖌 Save Close	Preview New Copy Follow-Up Create	Project Check Cre	edit Limit	
General Items Pricing and I	nvoicing Involved Parties Document Flow Change	es Attachments	Approval Process Output History Feed	
Details: Item Carol_Exp_fixed	price without actuals			
Details Taxes Notes	Attachments			
Item				
Service Status:	Released			
Delivery Status:	Not Started			
Invoice Status:	Not Started			
Item Type:	Expense - fixed price without actuals			
Description:	Carol_Exp_fixed price without actuals	Service		
Posting Date:	18.12.2017	Fulfillment:	Internal	*
Requested Date:	23.12.2017 1 00:00 V UK V	Service Performer:	Sandra Mohr	ð
Reason for Rejection:	· · · · · · · · · · · · · · · · · · ·	Supplier:		đ
Exchange:				
Excange/NetAmount:				
Excange/Price/NetPrice/Amount:				
Alaa:				
Process Type:	Sales Order			

3. Complete Service Execution

The Delivery Status changed to Finished.

Due to the item type-- Expense - fixed price without actuals, you can skip the Service Confirmation step since system won't consider actuals into Sales Order and invoice value will be fetched directly from Sales Order.

Sales Ord	ler: 3722	2										日ショ
Status: In Pro	cess Acc	count: Caro	Holdings Ex	ternal	I Reference: En	ployee Resp	ponsible: Ro	bert Mann Net Va	lue w/o Freight: 100,00	EUR Total:	124,00 EUR	
Submit 🖌	Save	Close	Preview	New	Сору	Follow-Up 🖌	Create F	Project Check C	redit Limit			Y
General Ite	e mis Prio	cing and Ir	voicing Inv	olvec	d Parties Docur	ment Flow	Changes	Attachments	Approval Process	Output Histo	ory Feed	
		-										
Detailer Ite	m Canal F	time discard		4 4								
			price withou		uais							
Details	Taxes	Notes	Attachments									
Item												
Service Sta	atus:		Released									
Delivery St	atus:		Finished / 1 Ead	ch								
Invoice Sta	itus:		Not Started									
Item Type:			Expense - fixed	t price	e without actuals							
								Service				
Description	1:			ea pric	ce without actuals			Fulfillment:	Internal			
Posting Da	te:		18.12.2017									
Requested	Date:		23.12.2017	1	00:00 🗸	UK	*	Service Performer:	Sandra Mohr			
Reason for	Rejection:						~	Supplier:				
Exchange:												
Excange/N	etAmount [.]											
Ŭ	rice/NetPrice	Amount										
Evcance/P	rice/NetPrice	/Amount										1

4. Invoice Sales Order Invoice Request

oup By None	Edit New P	review Export	Invoice - Advanced	Check			77 🖷
Status	Document ID	Invoice Request Type	Extern Account	Invoic	Net Value	Total	Cancellation Stat
To Be Invoiced	3722 🔳	Sales Order Invoice Request	Carol H	18.12	100,00 EUR	124,00 EUR	Not Canceled
etails: Sales Order In	voice Request 3722						
etails: Sales Order In	voice Request 3722	Description		Quantity			List Price

Back to the respective Sales Order

You can see Sales Order in Completed Status as well as on Item level.

Sales Order: 3722							ロット キッ 🎫
Status: Completed Account: C	arol Holdings Exte	rnal Reference:	Employee Responsi	ible: Robert Mann Net Valu	e w/o Freight: 100,00 EU	R Total: 124,00 EUR	
Submit a Save Close	Preview	lew 🖌 🗌 Copy	Follow-Up 🦼	Create Project Check Cre	dit Limit		You Can Also 🖌
General Items Pricing and	d Invoicing Invol	ved Parties D	Oocument Flow Ch	nanges Attachments A	Approval Process Out	tput History Feed	
Item							
Service Status:	Released						
Delivery Status:	Finished / 1 Each						
Invoice Status:	Finished						
Item Type:	Expense - fixed p	orice without actua	Is	Service			
Description:	Carol_Exp_fixed	price without actu	als	Fulfillment:	Internal		
Posting Date:	18.12.2017			Service Performer:	Sandra Mohr		
Requested Date:	23.12.2017	00:00	UK	Invoice Date:	18.12.2017		
Reason for Rejection:				Supplier:			
Exchange:							

With Service Confirmation:

1. Release Sales Order

The Status of Sales Order changed to Open after releasing order.

Sales Order: 3721									⊐ ୭ ⊫ ★	۵
Status: Open Account: Carol Hol	Idings External Referen	nce: Employee	Responsible:	Robert Ma	nn Net Value w	o Freight: 100,00 EU	R Total: 12	4,00 EUR		
Submit Save Close	Preview New 4	Copy Fo	ollow-Up 🖌	Create Pro	ject Check C	redit Limit			You Ca	an Also
General Items Pricing and I	Invoicing Involved P	Parties Docume	ent Flow	Changes	Attachments	Approval Process	Output His	story Feed		
Line ATP Product			C	Description	Contract Item		Quantity	List Pri	ce Discount (%))
10 CAROL_XFIX	- Carol_Exp_fixed price v	vithout actuals	8	Carol_Exp		1 🖩 ca	~	100,00 🗏 EUR	8	100
					1					
Item Service Status: Delivery Status:	Not Released Not Started									
Invoice Status:	Not Started									
invoice status.										
Item Type:	Expense - fixed price w	ithout actuals			Sanviao					
					Service					
Item Type:	Expense - fixed price w				Service	Internal			v	
Item Type: Description:	Expense - fixed price w Carol_Exp_fixed price w 18.12.2017		UK	- .					8	
Item Type: Description: Posting Date:	Expense - fixed price w Carol_Exp_fixed price w 18.12.2017	without actuals			Fulfillment:					

2. Release to Service Execution.

The Status of Sales Order changed to In Process.

Service Status changed to Released.

	es Order: 3721) 🖻 🛪 🖉	⊿ + ⊿
Q Sub	Is: Open Account: Carol Hol bmit A Save Close Release Order		Employee Responsib ppy Follow-Up Document Flow	Create P Changes	roject Check Cre		Output History	Feed	You Can A	lso 🖌
ññ 📃	Send Order Confirmation to Acc Release to Service Execution		Dodument How	onungeo						
	Cor service execution, an	ams to the order pipeline for d releases the order if this has e. The action also exists on item]							
S	ervice Status:	Not Released								
D	elivery Status:	Not Started								
In	nvoice Status:	Not Started								
Ite	em Type:	Expense - fixed price without a	ctuals		Service					
D	escription:	Carol_Exp_fixed price without	actuals							
P	osting Date:	18.12.2017			Fulfillment:	Internal		*		
R	equested Date:	23.12.2017	✓ UK	~	Service Performer:	Sandra Mohr		đ		
R	leason for Rejection:			~	Supplier:			đ		
E	xchange:									
E	xcange/NetAmount:									
F	xcande/Price/NetPrice/Amount-									
Sales O	order: 3721							Ģ	າ ອ ⊫ ★	S 40
Status: In I	Process Account: Carol Ho	oldings External Reference:	Employee Deserv							
Otatus. III	Account. Caronic			neible: Rob	art Mann Net Valu	e w/o Freight: 100 0		124.00 EUR		
			Employee Respo	nsible: Rob		e w/o Freight: 100,0	0 EUR Total:	124,00 EUR		
Submit 🛓	Save Close Pr	review		Create Pro			0 EUR Total: "	124,00 EUR	You C	an Also 🖌
	Save Close Pr	review	Follow-Up	Create Pro	oject Check Cre			,	You C	an Also 🖌
	Items Pricing and Invo	review	Follow-Up	Create Pro	Oject Check Cree	dit Limit	Output Histor	,		an Also 🖌
General L	Items Pricing and Invo	icing Involved Parties	Follow-Up	Create Pro	Oject Check Cree	dit Limit	Output Histor	y Feed		٦ ا
General L	Items Pricing and Invo	icing Involved Parties	Follow-Up Document Flow e of Supply	Create Pro	Attachments	dit Limit	Output Histor	y Feed	Discount (%	٦ ا
General Add Rov	Items Pricing and Invo	icing Involved Parties	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov	Items Pricing and Invo	icing Involved Parties	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line	Items Pricing and Invo w Remove Check ATP Product CAROL XFIX - Car	review New Copy icing Involved Parties (Availability Assign Source arol Exp fixed price without act	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Row Line 10 Details:	Items Pricing and Invo	eview New Copy icing Involved Parties Availability Assign Source arol Exp fixed price without act	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
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General Add Rov Line 10 Details: Details Item	Items Pricing and Invo	eview New Copy icing Involved Parties Availability Assign Source arol Exp fixed price without act	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line 10 Details: Details	Items Pricing and Invo	eview New Copy icing Involved Parties Availability Assign Source arol Exp fixed price without act	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line 10 Details: Details Item	Items Pricing and Invo W Remove Check ATP Product CAROL XFIX - Ca Item Carol_Exp_fixed pri Taxes Notes Status: Re	eview New Copy icing Involved Parties Assign Source and Exp fixed price without act ice without actuals Attachments	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line 10 Details: Details Item Service	Items Pricing and Invo w Remove Check ATP Product CAROL XFIX - Ca Item Carol_Exp_fixed print Taxes Notes Status: Re y Status: No	eview New Copy icing Involved Parties < Availability Assign Source arol_Exp_fixed price without act ice without actuals Attachments leased	Follow-Up Document Flow e of Supply	Create Pro Changes lace Product	Attachments	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line 10 Details: Details Item Service Delivery	Items Pricing and Invo w Remove Check ATP Product CAROL XFIX - Ca Item Carol_Exp_fixed pri Taxes Notes Status: No Status: No Status: No Status: No	eview New Copy icing Involved Parties < Availability Assign Source arol Exp fixed price without act ice without actuals Attachments leased t Started	Follow-Up Document Flow e of Supply Rep	Create Pro Changes lace Product	Attachments Release Exec	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line 10 Details: Details Item Service Delivery Invoice 3	Items Pricing and Invo w Remove Check ATP Product CAROL XFIX - Ca Item Carol_Exp_fixed pri Taxes Notes Status: No No Status: No Status: No Status: No Status: No Status: No Status: No	eview New Copy icing Involved Parties < Availability Assign Source arol Exp fixed price without act ice without actuals Attachments leased t Started t Started	r Follow-Up Foll	Create Produce	Attachments Release Exec Contract Item	dit Limit Approval Process ution <u>Complete</u> 1 <u>ea</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -
General Add Rov Line 10 Details: Details Item Service Delivery Invoice 8 Item Typ	Items Pricing and Invo w Remove Check ATP Product CAROL_XFIX - Ca Item Carol_Exp_fixed pri Taxes Notes Status: Re Status: No Status: No Status: No Status: No Status: No Status: No Status: No pe: Exp Exp Status: Status: No Status: No Status: No	eview New Copy icing Involved Parties (Availability Assign Source and Exp fixed price without act ice without actuals Attachments leased t Started t Started t Started pense - fixed price without actuals	r Follow-Up Foll	Create Produce	Attachments Release Exec	dit Limit Approval Process ution <u>Complete</u>	Output Histor	y Feed st Entry Renuml List Price	Discount (%	- - -

3. Complete Service Execution

The Delivery Status changed to Finished.

Sales Order: 3721	⊂ ୭ ⊫ ★ ୭ 🗤
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	You Can Also 🖌
General Items Pricing and Involved Parties Document Flow Changes Attachments Approval Process Output History Feed	
Details: Item Carol_Exp_fixed price without actuals	
Details Taxes Notes Attachments	
Item	
Service Status: Released	
Delivery Status: Finished / 1 Each	
Invoice Status: Not Started	
Item Type: Expense - fixed price without actuals	
Description: Carol Exp fixed price without actuals Service	
Posting Date: 18.12.2017 Fulfillment: Internal	
Requested Date: 23.12.2017 TO0:00 V UK V Service Performer: Sandra Mohr	
Reason for Rejection:	
Exchange:	
Excange/NetAmount:	
Excange/Price/NetPrice/Amount:	
Ala:	
Process Type: Sales Order	

Due to the item type-- Expense - fixed price without actuals, you can skip the Service Confirmation step since system won't consider actuals into Sales Order and invoice value will be fetched directly from Sales Order.

While the Confirm Service Execution tab is still available under the Submit dropdown list.

You can attach Service Confirmation to Sales Order per business needs.

Sales Order: 3721		ଅଜ୍≁∂ ¶
Status: In Process Account: Card	ol Holdings External Reference: Employee Responsible: Robert Mann Net Value w/o Freight: 100,00 EUR Total: 124,00 EUR	
Submit Save Close	Preview New I Copy Follow-Up Create Project Check Credit Limit	You Can Also
Release Order Send Order Confirmation to Acco		
Release to Service Execution Confirm Service Execution	thout actuals ments	
Creates a new service conf has been performed. The a released service and expen confirmation. Item Type:	ction is only relevant for ise items requiring a Expense - fixed price without actuals	
Description:	Carol_Exp_fixed price without actuals	
Posting Date:	18.12.2017 Fulfillment: Internal	
Requested Date:	23.12.2017 T 00:00 V UK V Service Performer: Sandra Mohr	
Reason for Rejection:	Supplier:	
Exchange:		
Excange/NetAmount:		
Excange/Price/NetPrice/Amount:		
Alaa:		
Decese Trees		

4. Confirm Service Execution

NO item details will be passed from Sales Order since this is XFIX item type.

New Serv		irmation Close						You Can	Also 🖌 View All
vrrived On:		1	•		Executed By Service Performer:	Sa	andra Mohr		Ð
To confirm a	d Spare Pa service, click choose With	Release. Then choos out Order Completion	e With Order Completion if the service or parts co	if the service or parts consumpti sumption is not finalized (further	on is finished (no furth confirmations are allo	her confirmation owed and the n	ns are allowed and the elated order item rema	related order item is compl ins in process).	eted).
Line	Status 🔻	Product		Description	Coverage	Quantity	Actual Duration	Reference Sales Order/ Item	List Price
					Total Item Net Value: Overall Discount (%)				

Here I entered actual duration *LARGER* than original one in Service Confirmation.

ew Servi	ce Confirma	ition											™★ ∿í
Release 🛓	Save Close											Į	You Can Als
eneral Se	rvices and S	oare Parts	Pricing and Ir	nvoicing Involved P	arties Documen	t Flow Cha	nges Attach	ments	Outpu	t History			
ervices and	l Spare Parts												
				npletion if the service or p parts consumption is not fi								mplete	d).
Add Row	Remove	Split Part(s)	Quantity Rele	lease 🖌									7
Line	Status	Pro	duct		Description		Cover		Quantity	Actual Du	Ne	t Value	Reference Sales Order/ Item
10	Not Starte	ed <u>CA</u>	ROL_XFIX - Caro	ol_Exp_fixed price witl	Carol_Exp_fixed p	rice without actu	lals	2 🗐	ea 👻		200,00	EUI	
Jetails: Car	rol_Exp_fixed p												
General	Time Reporting	Taxes	Notes										
Service/S	pare Part				State	us Informatio	on						
Product ID:		CAROL_XFIX			Statu	S:	Not Started						
Description: Carol_Exp_fixed price without actuals			Invoid	Invoicing Status: Not Started									
Reference S	Sales Order/Item:	1			Canc	ellation Status:	Not Canceled						

Back to the respective Sales Order> Document Flow

Sales Order: 3721	
Status: In Process Account: Caro	Holdings External Reference: Employee Responsible: Robert Mann Net Value w/
Submit J Save Close	Preview New Copy Follow-Up Create Project Check Credit L
General Items Pricing and Inv	voicing Involved Parties Document Flow Changes Attachments A
Show: Standard View	🗸 🔍 100% 🤤 🖑 🛛 Refresh 🔹 Return to Initial View
Sales Order	Service Confirmation
3721	857
Status:	Status:
In Process Created On: 18.12.2017	Finished Created On: 18.12.2017
	*

If you go to Customer Invoice WoC> Invoice Request, you will find other than Sales Order's invoice request, there is one more invoice request for Service Confirmation with the value you've input in Service Confirmation.

Status	Document ID	Invoice Request Type	Extern	Account	Invoic	Net Value	Total	Cancellation Statu
To Be Invoiced	857 🔺	Service Confirmation Invoice Request		Carol Ho	18.12	200,00 EUR	248,00 EUR	Not Canceled

5. ONLY Invoice Sales Order.

Show Modif	ied View - Today's Inv	voice 🔒 and Find	Go				C Advance
Group By N	one 🖌 📔	Edit New 🖌 Pre	eview Export 🖌 Invoice	Invoice - Advanced	Check		7
Status			Invoice Request Type	External Reference	Account	Invoice Date	
To Be Invoi	iced	3721 🔳	Sales Order Invoice Request		Carol Holdin	ngs 18.12.2017	10
	les Order Invoice	Request 3721				-	
Details: Sal	les Order Invoice	Request 3721	N			-	

Back to the Respective Sales Order.

Sales Order has been completed with all steps Finished.

ales Order: 3721								⊂ ୬ ⊫ ★ ●∰
atus: Completed Account: Card	ol Holdings Exter	nal Reference:	Employee Responsil	ole: Robert Mann Net Valu	ue w/o Freight: 100,00	EUR Total: 124	4,00 EUR	
Submit Save Close	Preview	ew 🖌 Copy	Follow-Up 🖌 C	reate Project Check Cre	edit Limit			You Can Also
neral Items Pricing and I	nvoicing Involv	ed Parties	Document Flow Ch	anges Attachments A	Approval Process	Output History	Feed	
Details: Item Carol_Exp_fixed	price without a	ctuals						
Details Taxes Notes	Attachments							
Item								
Service Status:	Released	1						
Delivery Status:	Finished / 1 Each							
Invoice Status:	Finished							
Item Type:	Expense - fixed pr	ice without actu	als	Service				
Description:	Carol_Exp_fixed price without actuals			Fulfillment:	Internal			
Posting Date:	18.12.2017			Service Performer:	Sandra Mohr			
Requested Date:	23.12.2017	00:00	UK	Invoice Date:	18.12.2017			
Reason for Rejection:				Supplier:				
Exchange:								
Excange/NetAmount:								
Excange/Price/NetPrice/Amount:								
Alaa:								

NOTE:

1. Invoicing Service Confirmation or not won't affect Sales Orders' Completion.