SAP S/4HANA 1909 Fully-Activated Appliance:
Service Demo Guide
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## Document History

<table>
<thead>
<tr>
<th>Revision</th>
<th>Date</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>&lt;2019-12-06&gt;</td>
<td>Release for customer</td>
</tr>
</tbody>
</table>
1 How Can This Script Be Used?

This demo script has been written for usage with the SAP S/4HANA 1909 Feature Package Stack 00 (FPS00) Fully-Activated Appliance (in short “appliance” in this script), hence you will need such an appliance to make use of this guide.

The appliance can be brought up in two ways, and the demo scenario in this script is largely the same for both:

1. Via SAP Cloud Appliance Library (hosted on cloud providers)
   You need a cloud provider account at AWS, MS Azure, or GCP. With this, you can deploy the appliance within 1-2 hours from https://cal.sap.com > Solutions > SAP S/4HANA 1909 FPS00 Fully-Activated Appliance.
2. Via installing it on your own on-premise hardware.
   You need to provide your own hardware, and order & install the appliance as explained in SAP Note 2041140.

If you are new to the SAP S/4HANA Fully-Activated Appliance, introductory information can be found here: https://blogs.sap.com/2018/12/12/sap-s4hana-fully-activated-appliance-create-your-sap-s4hana-1809-system-in-a-fraction-of-the-usual-setup-time/

Important:
Before you start your demo, please read SAP S/4HANA Fully-Activated Appliance: Demo Scripts for information about necessary preparations, especially any post-deployment steps to ensure the full functionality of your appliance. These steps are covered in sections:
   B) General Remarks
   C) Post-deployment Steps
   D) Log-on to the system
Besides this, you will also find links to all demo scripts on this page.
2 Demo Story: Service

This business process covers the entire process flow from service request to service quotation, service order, service confirmation through to billing. The scenarios below are based on a B2B scenario with accounts (companies) and contact persons related to the accounts.

The following pre-defined users are available for this demo story:

<table>
<thead>
<tr>
<th>User</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>IC_AGENT_SRV</td>
<td>Interaction Center role for service request receipt, knowledge article search and inbox processing</td>
</tr>
<tr>
<td>SERV_MAN</td>
<td>Service professional role to process all service-related documents, master data and related functions; workflow approval for sales orders is enabled for this user</td>
</tr>
<tr>
<td>SERV_EMPL</td>
<td>Basic service employee role to process service-related documents</td>
</tr>
</tbody>
</table>

The scenarios in this demo script have been tested with the SAP Best Practices master data mentioned in the scenarios below. For a complete overview of master data available for the SAP Best Practices for SAP S/4HANA (on premise) solution, refer to this document: https://rapid.sap.com/bp/BP_OP_ENTPR → scroll down to Master data overview.
3 Prerequisites

3.1 Generate Work Schedules

Work schedules are relevant when creating service confirmations. To avoid error messages during service confirmations, generate the relevant work schedules manually:

Log on to the backend SAP GUI system.

Access the IMG via transaction SPRO → SAP Reference IMG.

In the IMG, navigate to Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Generate Work Schedules Manually.

On the Create Work Schedule screen, maintain the following data:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee subgroup grouping</td>
<td>2</td>
</tr>
<tr>
<td>Holiday calendar</td>
<td>99</td>
</tr>
<tr>
<td>Personnel subarea grouping</td>
<td>99</td>
</tr>
<tr>
<td>Work schedule rule</td>
<td>YB00</td>
</tr>
<tr>
<td>Calendar month from (MMYYYY)</td>
<td>&lt;current month / year, for example, 122019&gt;</td>
</tr>
<tr>
<td>to (MMYYYY)</td>
<td>&lt;maintain a suitable month / year, at least current month / year, or a month in the future&gt;</td>
</tr>
</tbody>
</table>

Choose Create all.

Confirm Work schedule ( ) already exists warnings by choosing Enter (until no more warnings are displayed).

If relevant, select a customizing request.

3.2 Create Service Order Template (Optional)

You use service order templates to define reusable sets of service-related data that minimize the amount of time required to create a service transaction. A service order template describes only the scope of the planned services and not the actual execution (customer and time frame).

Optionally create a service order template. You can use this template, for example, when creating a service order quotation or service order.
<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log on to the Fiori Launchpad:</td>
<td><img src="image" alt="Image of Fiori Launchpad" /></td>
</tr>
<tr>
<td><strong>User:</strong> SERV_MAN</td>
<td><img src="image" alt="User Input" /></td>
</tr>
<tr>
<td><strong>Password:</strong> Welcome1</td>
<td><img src="image" alt="Password Input" /></td>
</tr>
<tr>
<td><strong>Language:</strong> English</td>
<td><img src="image" alt="Language Selection" /></td>
</tr>
<tr>
<td><strong>Client:</strong> 100</td>
<td><img src="image" alt="Client Input" /></td>
</tr>
</tbody>
</table>

On the Fiori Home page, choose the Service Orders group, then Service Order Template Create.

On the **Order Template: New** view, in the Details area maintain the following data:

- **Description:** Maintenance with Spare Part
- **Employee Responsible:** Ryan Reval
- **Service Employee Group:** SRV_BO

On the Fiori Home page, choose the Service Orders group, then Service Order Template Create.

On the **Order Template: New** view, in the Details area maintain the following data:

- **Description:** Maintenance with Spare Part
- **Employee Responsible:** Ryan Reval
- **Service Employee Group:** SRV_BO

**Dates**

- **Valid From:** 1/2/2023 00:00
- **Valid To:** 1/2/2023 00:00

**Template Search Term:** Maintenance
In the Items area of the template, maintain the following data:

- **Product ID** (for service) = CSSRV_01
- **Quantity** = 1
  - Choose Enter.

In the next line maintain:

- **Higher-Level Item** = 10 (the item number of the service item)
- **Product ID** (for spare part) = TG11
- **Quantity** = 1
  - Choose Enter.

Set the **Status** to **Released**.
- Then choose **Save**.

### 3.3 Assigning PFCG Role to Users

To receive workflow notifications to release sales quotations and sales orders, assign the PFCG role Z_SD_WF to the SLS_MAN and SERV_MAN users.

1. In the backend system (GUI), access transaction SU01.
2. On the **User Maintenance: Initial Screen** view, as **User** maintain **SLS_MAN**. Then choose **Change (Shift + F6)**.
3. On the **Maintain Users** view, on the **Roles** tab page, maintain **Role**: Z_SD_WF.
4. **Save** your settings.
5. Repeat these steps for the **SERV_MAN** user.
4 Scenario 1: Service Request Processing in the Interaction Center

4.1.1 Identify and Confirm Account

A customer contacts the helpdesk. The helpdesk agent identifies the caller and (optionally) the affected piece of equipment. Note that for the fully-activated appliance, no integration settings to contact channels (e.g. for e-mail, phone or chat integration) are available. For the steps below we assume that the customer calls and the helpdesk agents maintain the call details manually.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log on to the Fiori Launchpad:</td>
<td></td>
</tr>
<tr>
<td>User: <strong>IC_AGENT_SRV</strong></td>
<td><strong>ic_agent_srv</strong></td>
</tr>
<tr>
<td>Password: <strong>Welcome1</strong></td>
<td>************</td>
</tr>
<tr>
<td>Language: <strong>English</strong></td>
<td><strong>EN - English</strong></td>
</tr>
<tr>
<td>Client: <strong>100</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Choose the **SAP S/4HANA Service** tile. Result: The Interaction Center’s **Identify Account** view is displayed.
On the **Identify Account** view, in the **Account ID** field maintain 171*. Alternatively maintain other search criteria, e.g. for the **Account** field you can maintain *cust* as search string. Then choose **Search Account**.

In the **Result List**, choose **Confirm** for account 17100001 or 17100002.

In the **Related Partners** list, confirm one of the available contact persons, e.g. for account 17100001: Susan Miller

Result after confirming both the account and the contact person:

If the call is about a piece of equipment, e.g. a machine, scroll up and choose the **Equipment** view.

Note: This and the following steps are optional and can be skipped.
On the Equipment view, the account ID is defaulted based on the confirmed account. Choose Search.

Confirm the relevant piece of equipment.

Note: If exactly one piece of equipment is assigned to the account, the equipment details are displayed. If more than one piece of equipment is available, choose the relevant one from the result list.

To get an overview of recent interactions with the customer, navigate to the Interaction History. Make sure the account ID is maintained, then choose Search. Result: The customer’s past interactions are displayed in the Result List.
To display related documents in the interaction history’s result list, choose **Show Tree**.

In the Tree view, you can expand each item to find related documents.

**Table View:**

<table>
<thead>
<tr>
<th>Status</th>
<th>Main Category</th>
<th>Object (ID)</th>
<th>Description</th>
<th>Created On/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>0003 - Completed</td>
<td>SRV0 - Service Order</td>
<td>80000000080</td>
<td>Service order with sales item</td>
<td>11/20/2019 08:42:15</td>
</tr>
<tr>
<td>0003 - Completed</td>
<td>SRV0 - Service Order</td>
<td>80000000071</td>
<td>Bill service order</td>
<td>11/18/2019 09:05:09</td>
</tr>
<tr>
<td>0003 - Completed</td>
<td>SRV0 - Service Order</td>
<td>80000000070</td>
<td>Information required</td>
<td>11/19/2019 08:50:30</td>
</tr>
</tbody>
</table>

**Tree View:**

<table>
<thead>
<tr>
<th>Node</th>
<th>Status</th>
<th>Main Category</th>
<th>Object (ID)</th>
<th>Description</th>
<th>Created On/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0003 - Completed</td>
<td>SRV0 - Service Order</td>
<td>80000000080</td>
<td>Service order with sales item</td>
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</tr>
<tr>
<td></td>
<td>0003 - Completed</td>
<td>SRV0 - Service Order</td>
<td>80000000071</td>
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</tr>
<tr>
<td></td>
<td>0003 - Completed</td>
<td>SRV0 - Service Order</td>
<td>80000000070</td>
<td>Information required</td>
<td>11/19/2019 08:50:30</td>
</tr>
</tbody>
</table>

If the helpdesk agents want to record information before deciding whether to create a service request, they can do so in the **Scratch Pad**.

Open the **Scratch Pad**.

Maintain a description in the scratch pad dialog box, then choose **Save**.

### 4.1.2 Create Service Request

After having identified the caller and after having reviewed the relevant customer information, the helpdesk agent creates a service request to process the customer’s issue.
<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>After having confirmed an account and contact person, in the navigation area choose <strong>Service Request</strong>.</td>
<td><img src="image1.png" alt="Partner Selection Document header" /></td>
</tr>
</tbody>
</table>

If a dialog box to choose a service employee group (**Partner Selection Document header**) is displayed, choose one of the available service employee groups, for example, **ICNT_1_SUP** by clicking the respective line.

In the new service request the confirmed account, contact person and equipment you chose in the previous chapter are displayed.

Maintain a **Description** and select an **Impact** and an **Urgency**.

Based on the impact/urgency combination, a priority is determined automatically and the **First Response By** and **Due By** dates are calculated.
In the Subject area you can categorize the service request. For example, choose **Complaint** for **Category 1** and **Product** for **Category 2**.

If one or multiple knowledge articles are available for the selected categorization, a knowledge article alert is displayed in the **Alerts** area.

### 4.1.3 Search for Knowledge Article

Solution proposals to customer issues can be maintained as knowledge articles. In this step the helpdesk agent tries to find a suitable knowledge article for the customer’s issue.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>If a knowledge article is displayed in the <strong>Alerts</strong> area, navigate to the <strong>Knowledge Article Search</strong> by choosing the alert. Alternatively you can choose <strong>Knowledge Article Search</strong> in the navigation area.</td>
<td><img src="image1" alt="Knowledge Article Search" /></td>
</tr>
</tbody>
</table>

![Knowledge Article Search](image2)
In the Search: Knowledge Articles view you can search knowledge articles by description and other search criteria.

In the knowledge article Result List, display the descriptions maintained for the knowledge articles by choosing the arrow on the left side of the Knowledge Article ID.

For this sample process we assume that the customer issue cannot be solved remotely.

Note: If e-mail integration was set up, which is not the case in the appliance, the helpdesk agent would be able to send selected knowledge articles to the customer via e-mail.

4.1.4 Dispatch Service Request to 2nd Level

In our scenario the 1st level helpdesk agent cannot solve the customer issue on the phone and the service request must be dispatched to the 2nd level support team for further processing. Dispatching a service request can be done via several options. In this application a very simple rule is set up with which the helpdesk agent can dispatch the service request to the 2nd level support team.
What you will do | What you will see
---|---
By choosing Service Request in the navigation area, navigate back to the service request. The helpdesk agent wants to maintain the information collected during the call in the service request.

![](image1)

In the Notes area, choose New to maintain the detailed description for the service request.

In the Service Request: New – Notes view, select the appropriate text type and maintain the detailed description in the Text area. Optionally, if you have maintained text in the Scratch Pad as described in the previous chapter, choose Import Scratch Pad to paste the existing text into the Text area. Then choose Back.

To dispatch the service request, open the three dots (…) in the top right corner and choose Dispatch.
In the appliance, when you choose Dispatch, a simple rule clears the employee responsible field and maintains the ICNT_2_SUP team as responsible service team.

Set the Status to In Process.

To end the interaction and save all open documents, choose End.

Result: The system navigates back to the Identify Account view and the helpdesk agent can take the next call.

4.1.5 Process Service Request and Create Service Quotation

The Inbox is the central worklist for helpdesk agents and support employees. In our scenario, a support employee picks up the service request created in the previous chapters and creates a service quotation as follow-up document.

For easiness sake, you can stay logged on with the IC_AGENT_SRV user.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate to the Inbox by choosing Inbox in the navigation area.</td>
<td>Account Identification Interaction Record Interaction History Service Request E-Mail Knowledge Article Search Inbox Index</td>
</tr>
</tbody>
</table>
In the appliance, a default Quick Search is available that automatically selects and displays all open items of diverse transaction types. You can adjust the search result by choosing different search criteria. The 2nd level employee notices that no employee responsible is maintained for the previous service request and reviews its details by choosing the Object (ID).

To take ownership of the service request, choose Edit and maintain the employee’s name in the Employee Responsible field.

Note: When choosing Edit, the system suggests the employee assigned to the user that is logged on = Ann Anderson. Optionally you can overwrite the proposal with, for example, Barbara Lee.

The employee decides to create a service order quotation as follow-up of the service request. Choose Create Follow-Up.
On the Follow-Up dialog box, choose the line with Service Order/Quot. – Order Quotation.

Result: The service order quotation view opens.

If a partner selection dialog box is displayed, choose one of the available contact persons.

Update the quotation Description, for example: Onsite service offer.
In the *Items* list, maintain the items you want to offer to the customer:

- **Product ID** (for service) = **CSSRV_01**
- **Quantity** = **1**

Choose **Enter**.

In the next line maintain:

- **Higher-Level Item** = **10** (the item number of the service item)
- **Product ID** (for spare part) = **TG11**
- **Quantity** = **1**

Choose **Enter**.

**Note:** For this scenario, make sure that the TG11 item is classified as “Service Spare Item” category.

**Note:** If you have created a service order template as described in the Prerequisites, optionally you can use the **Copy from Template** function to copy the items into the quotation.

Navigate back to the service request by choosing **Service Request** in the navigation area.

Update the service request. For example, in the **Notes** area, as **Solution Description** maintain: *Quotation created to offer onsite service.*

Then choose **Back**.
Update the service request Status to Customer Action. Then choose End to save all open documents.

Choose Sign Out to log off from the Service application. Then also sign out from the Fiori launchpad.

4.2 Scenario 2: Service Order Processing

4.2.1 Create Service Order

In this scenario, the service professional creates a service order to plan the onsite service execution. Service orders can be created as follow-up documents of diverse other documents, for example, as a follow-up of a service order quotation. And they can be created without predecessor document. For this scenario, along with the service itself a spare part that is usually available on stock is planned.
4.2.1.1 Create Service Order as Follow-Up of a Quotation

In the previous scenario a service order quotation was created. Use this quotation to create a service order as follow-up document. Note: If the total value for the quotation/order is higher than 100 USD, this may trigger a workflow approval process. Look for a notification alert (top-right corner after a short delay) so that you can release/approve the document for further processing.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log on to the Fiori Launchpad:</td>
<td></td>
</tr>
<tr>
<td><strong>User:</strong> SERV_MAN</td>
<td>serv_man</td>
</tr>
<tr>
<td><strong>Password:</strong> Welcome1</td>
<td>**********</td>
</tr>
<tr>
<td><strong>Language:</strong> English</td>
<td>Sprache</td>
</tr>
<tr>
<td><strong>Client:</strong> 100</td>
<td>EN - English</td>
</tr>
<tr>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>

On the Fiori Home page, choose the Service Orders group, then Service Order Quotations Search.
On the **Search: Service Order Quotations** view, maintain relevant search parameters, for example: **Lifecycle Status is Open**. Then choose **Search**.

To navigate to the service order quotation details, in the **Result List** choose the ID of the quotation you previously created.

The service professional ensures that the quotation contains all relevant information, then releases it. Choose **Edit**. Set the **Status** to **Released**. Then choose **Save**. Note: For easiness’ sake choose the **Released** status directly, assuming the customer has accepted the offer.

As a result of releasing the quotation, a service order has been created automatically. **Note**: If you want to create a follow-up service order manually, for example, from a service request, this is possible via the **Create Follow-Up** option.
Navigate back to the Fiori Home page by choosing the SAP logo.

4.2.1.2 Create Service Order Without Predecessor Document

To create a service order without predecessor document, proceed as follows

*Note: if the total value for the quotation/order is higher than 100 USD, this may trigger a workflow approval process. Look for a notification alert (top-right corner after a short delay) so that you can release/approve the document for further processing.*

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log on to the Fiori Launchpad:</td>
<td><img src="image" alt="Login screen" /></td>
</tr>
<tr>
<td><em>User:</em> SERV_MAN</td>
<td>serv_man</td>
</tr>
<tr>
<td><em>Password:</em> Welcome1</td>
<td>*********</td>
</tr>
<tr>
<td><em>Language:</em> English</td>
<td>Sprache</td>
</tr>
<tr>
<td><em>Client:</em> 100</td>
<td>EN - English</td>
</tr>
<tr>
<td><em>Note:</em> As an alternative you can use the SERV_EMPL user.</td>
<td>100</td>
</tr>
</tbody>
</table>

On the Fiori Home page, choose the *Service Orders* group, then *Service Order Create.*
On the **Service Order: New** view, maintain a **Sold-To Party** (customer). Either manually enter account ID *17100001* (or *17100002*) and choose **Enter** or use the search help.

If selection dialog boxes are offered after maintaining the sold-to party, select from the available values, for example:

- **Partner selection for service group:** **SRV_BO**
- **Partner selection for contact person:** **Susan Miller**

In the **Items** list, maintain the relevant service (product)*:  
**Product ID = CSSRV_01**  
**Quantity = 1**  
Then choose **Enter**.
If a contract is determined for the maintained service product, assign it to the item by selecting the relevant line in the dialog box.

If a service contract is assigned to the item, the determined price can differ from the standard price.

In the **Items** list, maintain a spare part*:

* **Higher-Level Item** = 10 (number of the service product's item)
* **Product ID** = TG11
* **Quantity** = 1

Then choose **Enter**.

In the **Service Order Details**, maintain the following entries:

* **Description**: Maintenance Service
* **Status**: Released

Then choose **Save**.

*Note: Instead of maintaining the service product and spare part manually, if you have created a service order template as described in the Prerequisites chapter, you can also copy the items from the template like this:
**What you will do**

To copy items from a template, in the Items list choose **Copy from Template**.

On the **Copy Template Items** dialog box, choose **Search**. In the **Result List**, select the relevant items and click **Choose** to copy them into the service order.

### 4.2.2 Process Service Order

In this scenario, the service professional reviews and releases open service orders. Once a service order is released, the customer visit can be scheduled in a field service planning and execution application, for example, in **SAP Field Service Management**.

The integration to **SAP Field Service Management** is not included in this appliance.
<table>
<thead>
<tr>
<th><strong>What you will do</strong></th>
<th><strong>What you will see</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the <strong>Service Orders</strong> group, then <strong>Service Order Search</strong>.</td>
<td><img src="image" alt="Service Orders page" /></td>
</tr>
</tbody>
</table>

In the **Create Service Order as Follow-Up of a Quotation** chapter, a service order was created automatically. This service order still has the status Open. To release it, on the **Search: Service Order** view, search with this search parameter: **Lifecycle Status is Open**. Then choose **Search**. From the **Result List**, navigate to the service order details by choosing the **Service Order ID**. In the **Service Order** view, choose **Edit** and review the service order’s details and items. As **Status**, select **Released**. Then choose **Save**. | ![Result List](image) | ![Service Order Detail](image) |
4.2.3 Create Service Confirmation

In this scenario, the service professional creates a service confirmation to confirm working time and used spare parts for a service order. For this sample process, the spare part is available on stock and a goods movement document is created automatically when saving the service confirmation.

The service confirmation is the basis on which customer invoices are created.

Not included in the appliance: If a field service planning and execution application, for example, SAP Field Service Management is used, the technician would be able to maintain his/her working time and used parts in an offline application onsite. The information captured offline could later be synced with SAP S/4HANA Service and automatically create service confirmations like described below.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the Service Orders group, then Service Order Search.</td>
<td><img src="image" alt="Service Order Search" /></td>
</tr>
<tr>
<td>On the Search: Service Order view, search for released service orders: Lifecycle Status is Released. Then choose Search. Navigate to the service order details by choosing the Service Order ID.</td>
<td><img src="image" alt="Service Orders Search" /></td>
</tr>
</tbody>
</table>
In the **Service Order** view, choose **Create Follow-Up**.

On the **Follow-Up** dialog box, choose the line with **Service Confirmation / Confirmation**.

On the **Follow-Up – Select Items** dialog box, select both items, then select **Choose**.

Optional step: To review the details for the items, for example, the service item, in the **Items** list navigate to the item’s details by choosing the **Edit** icon.
On the Confirmation Item view, if required, you can update the Start of Work date and time and/or Quantity. Then navigate back to the confirmation view.

To confirm the completeness of the confirmation, set the Status to Completed. Then choose Save.
4.2.4 Complete Service Order

Before the service confirmation can be billed, the service manager reviews whether there are any open items in the service order, and if not, completes the service order.

**What you will do**

Logged on with the SERV_MAN user, on the Fiori Home page, choose the Service Orders group, then Service Order Search.

**What you will see**

On the Search: Service Order view, search for released orders with this search parameter: Lifecycle Status is Released.

Then choose Search.

Navigate to the service order details by choosing the Service Order ID.
In the service order view, navigate to the Confirmations area and make sure that all related confirmations are completed. Optionally navigate to the confirmation by clicking the ID, and compare the items reported in the confirmation with those in the service order.

If all items in the service order have been confirmed, choose Edit. As Status, choose Completed. Then choose Save.

### 4.2.5 Release Service Confirmation for Billing

After completing the service order, the service manager releases the service confirmation(s) for billing.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the My Home group, then SAP S/4HANA Service.</td>
<td><img src="image" alt="Service Order: 8000000081, Onsite service offer" /></td>
</tr>
</tbody>
</table>
Open the **Home** menu and choose **Service Operations**.

On the **Service Operations** page, choose **Release for Billing**.

On the **Search** screen, choose **Search**:

Select the items belonging to the service confirmation you created above. Then choose **Release for Billing**.
4.2.6 Bill Service

After releasing the service confirmation items for billing, the billing clerk creates the customer invoice. For easiness’ sake, you can stay logged on as service manager. Alternatively, you can log off as service manager and log on with the S4H_SD_DEM user.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the Service-Related Apps group, then open the Create Billing Documents (VF04) app.</td>
<td><img src="image1" alt="Create Billing Documents (VF04) app" /></td>
</tr>
</tbody>
</table>

Open the Maintain Billing Due List view, as search criteria maintain: Documents to Be Selected = External Data

Then choose Display Billing List.
In the billing due list, select the entry belonging to the service confirmation created above. Then choose **Individual Billing Document**.

On the **Invoice (F2) Create: Overview of Billing Items** screen, review the items. To create the invoice, choose **Save**. A success message **Document 9xxxxxx saved (no journal entry generated)** is displayed. To create a journal entry in the next step, make a note of the document number.

Close the **Maintain Billing Due List** view, then navigate to **Change Billing Documents**. To create a journal entry, as **Billing Document** maintain the document number from the previous step. Choose **over to Accounting**.

**4.2.7 Display Document Flow in Service Confirmation (Optional)**

If you want to review the document flow of a service confirmation, proceed as described below. This is an optional step.
<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the <strong>Service Orders</strong> group, then <strong>Service Confirmation Search</strong>.</td>
<td>![Fiori Home page with Service Confirmation Search highlighted]</td>
</tr>
<tr>
<td>Search for the service confirmation created above, then navigate to its details by clicking on the <strong>Service Confirmation ID</strong>.</td>
<td>![Search: Service Confirmations panel]</td>
</tr>
<tr>
<td>On the <strong>Confirmation</strong> view, navigate to the <strong>Transaction History</strong> area. Along with an internal order for cost collection and the billing document created in the previous step, a goods movement document has been created for the TG11 spare part consumption.</td>
<td>![Confirmation: 5000111, Onsite service offer]</td>
</tr>
</tbody>
</table>
5 Demo Story: Presales

This business process covers the entire process flow from registering customer interest in a product through to lead and opportunity management, resulting in a sales quotation.

For the core sales process flow from sales quotation to sales order, delivery, and customer invoice, refer to the Sell from Stock with Outbound Delivery Processing demo script.

The following pre-defined user is available for this demo story:

<table>
<thead>
<tr>
<th>User</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLS_MAN</td>
<td>Sales professional role to process all presales-related documents, master data and related functions; workflow approval for sales orders is enabled for this user.</td>
</tr>
</tbody>
</table>

For the process flow below, usually more than one employee (and user) would be affected. For ease of use you can execute all the steps with the above-mentioned user, though.

The scenarios in this demo script have been tested with the SAP Best Practices master data mentioned in the scenarios below. For a complete overview of master data available for the SAP Best Practices for SAP S/4HANA (on premise) solution, refer to this document: https://rapid.sap.com/bp/BP_OP_ENTPR → scroll down to Master data overview.

5.1 Scenario: Lead and Opportunity Management

5.1.1 Create Task and Follow-Up Lead

During a customer contact, for example, during a call or an onsite visit, an employee finds out that the customer would like to discuss a product in more detail. To make sure that there will be a follow-up activity, the employee creates a task.

The task can be created stand-alone or as a follow-up document of any other transaction, for example, as a follow-up of a service request, a service order, a lead etc. In this chapter we describe how to create a task without predecessor document.

After the call with the customer, it becomes clear that the presales colleagues should follow-up with the customer. The employee creates a lead as follow-up of the task. Of course, the lead can also be created without predecessor document.
<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| Log on to the Fiori Launchpad:  
*User:* SLS_MAN  
*Password:* Welcome1  
*Language:* English  
*Client:* 100 | ![Login Screen](image1)  
User Name: `slds_man`  
Password: `********`  
Language: `EN - English`  
Client: 100 |
| Choose the SAP S/4HANA Service tile.  
The Sales Professional’s *Home* page is displayed. | ![Home Screen](image2)  
SAP S/4HANA Service  
Launch SAP S/4HANA... |
| On the *Home* page, in the *Create* area, choose *Task*. | ![Create Area](image3)  
Create  
---  
Activity  
Appointment  
Interaction Log  
Lead  
Opportunity  
Sales Order  
Sales Quotation  
**Task** |
On the **Task: New** view, maintain the following data:

- **Description:** Call Customer
- **Due Date:** <a date in the future>
- **Account:** 17100001
- **Contact:** Susan Miller

Optionally maintain a detailed description in the **Notes** area. Then choose **Save and Back**.

The system navigates back to the **Home** page. Since in the new task the employee responsible is the same as the one you are logged on with (SLS_MAN = Jennifer Stone), the task appears in the **My Open Tasks** area.

On the **Home** page choose the task in the **My Open Tasks** area. In the task, choose **Edit**. As **Status** choose **Completed**, and then choose **Save**.

**Note:** As an alternative you can find the task by choosing **Search: Activities** on the **Home** page.
After having saved the task, choose Create Follow-Up. On the Follow-Up dialog box, choose the line with the transaction type Lead.

On the Lead: New view, maintain the following data:
Description: Product Offer
Start Date: <today’s date>
End Date: <a date in the future>
Priority: Very High
Group: Top 100 Customers

 Optionally maintain a detailed description in the Notes area. Then choose Save.

5.1.2 Process Lead

A presales employee finds the lead in the result list and distributes it. Afterwards the assigned employee responsible assesses the lead.
<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SLS_MAN user, on the Home page in the Search area, choose Leads.</td>
<td><img src="image" alt="Search: Leads" /></td>
</tr>
<tr>
<td>On the Search: Leads view, maintain suitable search criteria, for example: Status is Open and Status is In Process Then choose Search.</td>
<td><img src="image" alt="Result List: 3 Leads Found" /></td>
</tr>
<tr>
<td>In the Result List, select the lead and then choose Distribute.</td>
<td><img src="image" alt="Lead - Distribution" /></td>
</tr>
<tr>
<td>On the Lead – Distribution view, choose Method: Rule-Based Distribution. Then choose Update. As a result, the Recipient Jennifer Stone is determined. Choose Save and Back. Note: If Jennifer Stone cannot be determined based on a rule, choose Manual Employee Selection and maintain Jennifer Stone as Employee Responsible.</td>
<td><img src="image" alt="Result: Lead - Distribution" /></td>
</tr>
</tbody>
</table>
Back on the *Search: Leads* view, apply suitable search criteria to find the leads assigned to Jennifer Stone, for example: *Status* is *Open*  
*Belonging To* is *Me*.

On the *Lead* view, in the *Assessments* area, choose *Edit* for the *LEAD QUESTIONNAIRE*.

On the *Assessment* view, select the following options:  
- *Notbooks*  
- *>500 employees*  
- *>100 units*  
Choose *Save and Back*.  
Based on the assessment, the lead’s qualification level is determined as *Hot*.  

---

*Search: Leads* view: Search criteria for finding leads assigned to Jennifer Stone.  
*Lead: 40041, Product Offer, Domestic US Customer 1*  
*Lead: 40041, Product Offer, Domestic US Customer 1 - Assessment*
Jennifer now maintains the product the customer is interested in. On the **Lead** view, choose **Edit**.

In the **Products** area, maintain the following data:
- **Product ID**: TG11
- **Quantity**: 100

Choose **Enter**.

In the **Lead Details**, optionally update the **Status** to **In Process**, then choose **Save**.

---

**5.1.3 Create and Process Opportunity**

A sales employee accepts the lead and creates an opportunity for it. For ease of use, stay logged on with the SLS_MAN user (Jennifer Stone) and continue where you left in the last chapter.

Note: As an alternative you can also create an opportunity as follow-up of another document type, or stand-alone without predecessor document.
### What you will do

In the **Lead** view, choose **Create Follow-Up**.

### What you will see

<table>
<thead>
<tr>
<th>Lead: 40041, Product Offer, Domestic US Customer 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Data</strong></td>
</tr>
<tr>
<td>Type: Lead</td>
</tr>
<tr>
<td>ID: 40041</td>
</tr>
<tr>
<td>Description: Product Offer</td>
</tr>
<tr>
<td>Prospect: Domestic US Customer 1</td>
</tr>
<tr>
<td><strong>Dates</strong></td>
</tr>
<tr>
<td>Start Date: 11/29/2019</td>
</tr>
<tr>
<td>End Date: 12/06/2019</td>
</tr>
</tbody>
</table>

On the **Follow-Up** dialog box, select the line with transaction type **Sales Methodology**.

On the **Follow-Up – Select Items** dialog box, select the available items, then click **Choose**.

On the **Sales Methodology: New** view, maintain the following data:

- **Closing Date**: <a date in the future>
- **Expected Sales Volume**: 1,000 USD
- **Sales Stage**: Qualification
- **Status**: In Process

Optionally maintain detailed milestones in the **Milestones** area. Then choose **Save**.
### 5.1.4 Complete Opportunity and Create Sales Quotation

The sales employee evaluates and completes the opportunity and, as a follow-up, creates a sales quotation. For subsequent steps after creating the sales quotation, please refer to the Sell from Stock with Outbound Delivery Processing demo script. **Note: If the total value for the quotation/order is higher than 100 USD, this may trigger a workflow approval process. Look for a notification alert (top-right corner after a short delay) so that you can release/approve the document for further processing.**

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SLS_MAN user, on the Home page choose Search: Opportunities.</td>
<td><img src="image" alt="Opportunities Search" /></td>
</tr>
</tbody>
</table>

On the Search: Opportunities view, maintain search criteria, for example: Lifecycle Status is In Process Belonging To is Me Choose Search.

Navigate to the opportunity details by choosing its Description.

<table>
<thead>
<tr>
<th>Search: Opportunities</th>
<th>Hide Search Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity ID is In Process Belonging To is Me</td>
<td><img src="image" alt="Search Opportunities" /></td>
</tr>
</tbody>
</table>

| Result List: 4 Opportunities Found | | |
|-------------------------------------|---|---|---|---|---|---|---|
| Opportunity | Sales Stage | Description | Expected Sales Value | Currency | Closing Date | Employee Responsible |
| 5010 Quotation | In Process | Munich bill is... | 50.00 | USD | 12/02/2019 | Jennifer Stone |
| 50061 Decision | In Process | Interesting lead | 450.00 | USD | 12/16/2019 | Jennifer Stone |
| 5041 Qualification | In Process | Probable lead | 5,000.00 | USD | 12/202019 | Jennifer Stone |
| 5081 Qualification | In Process | Product Offer | 1,000.00 | USD | 12/27/2019 | Jennifer Stone |
In the **Opportunity Details** area, choose **Edit** and maintain the following values:

**Sales Stage**: **Quotation**
**Status**: **Won**

As a result, the system determines a win loss analysis survey in the **Assessments** area.

In the **Assessments** view, choose **Edit** for the **WIN_LOSS ANALYSIS**.

On the **Assessment** view, select at least one of the available selection options, then choose **Save and Back**.

On the **Sales Methodology** view, save your settings.
To create a sales quotation, choose **Create Follow-Up**.
On the follow-up dialog box, choose the line with *Sales Quotation*.

On the *Follow-Up* dialog box, select the line with the TG11 item, then click *Choose*.

On the *Quotation: New* view, maintain the following data:
- **External Reference**: `<for example, the opportunity ID>`
- **Valid To**: `<a date in the future>`

Then choose *Save*.

Make a note of the quotation ID.

Sign out as SLS_MAN and close all your Web browser windows.

For the core sales process flow from sales quotation to sales order, delivery, and customer invoice, refer to the *Sell from Stock with Outbound Delivery Processing* demo script.
Appendix

6.1 Service Order Processing for Sales Item

The following process flow is an alternative to the steps described in Scenario 2: Service Order Processing of the Demo Story: Service. The difference compared to Scenario 2 is that instead of using a spare part that is available on stock, in the steps below you trigger the creation of a sales order for a spare part that first needs to be ordered and delivered. The spare parts ordering and subsequent delivery is achieved by maintaining the required spare part as a sales item in the service order.

6.1.1 Create Service Order

In this scenario, the service professional plans a service for which the relevant spare part first needs to be ordered and delivered.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log on to the Fiori Launchpad: User: SERV_MAN Password: Welcome1 Language: English Client: 100</td>
<td><img src="image1" alt="Fiori Launchpad" /></td>
</tr>
</tbody>
</table>

On the Fiori Home page, choose the Service Orders group, then Service Order Create.
On the *Service Order: New* view, maintain a *Sold-To Party* (customer). Either manually enter account ID 17100001 (or 17100002) and choose *Enter* or use the search help.

If selection dialog boxes are offered after maintaining the sold-to party, select from the available values, for example:

- **Partner selection for service group:** SRV_BO
- **Partner selection for contact person:** Susan Miller

In the *Items* list, maintain the relevant service (product):

- **Product ID = CSSRV_01**
- **Quantity = 1**

Then choose *Enter*. 

---

![Service Order: New](image)

**Partner Selection Document header**

Partner Selection (max. 1)

<table>
<thead>
<tr>
<th>Def.</th>
<th>Function</th>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Service Employee Group</td>
<td>SRV_BO</td>
<td>SRV_BO / 3410 Hilview Avenue / Palo Alto CA 94304</td>
</tr>
<tr>
<td>☐</td>
<td>Service Employee Group</td>
<td>ICNT_2_SUP</td>
<td>ICNT_2_SUP / 3410 Hilview Avenue / Palo Alto CA ...</td>
</tr>
<tr>
<td>☐</td>
<td>Service Employee Group</td>
<td>ICNT_3_SUP</td>
<td>ICNT_3_SUP / 3410 Hilview Avenue / Palo Alto CA ...</td>
</tr>
</tbody>
</table>

---

![Service Order: New](image)

**Partner Selection Document header**

Partner Selection (max. 1)

<table>
<thead>
<tr>
<th>Def.</th>
<th>Function</th>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Contact Person</td>
<td>Ms. Susan Miller</td>
<td>Susan Miller / 200 Augusta Ave SE / Atlanta CA 303...</td>
</tr>
<tr>
<td>☐</td>
<td>Contact Person</td>
<td>Mr. James Smith</td>
<td>James Smith / 200 Augusta Ave SE / Atlanta CA 303...</td>
</tr>
</tbody>
</table>
If a contract is determined for the maintained service product, assign it to the item by selecting the relevant line in the dialog box. If a service contract is assigned to the item, the determined price can differ from the standard price.

In the Items list, maintain a spare part: 
- **Product ID**: TG11
- **Quantity**: 1

Then choose **Enter**. Make sure that as item category, **Sales Item** is maintained.

In the Service Order Details, maintain the following entries:
- **Description**: Repair Service
- **Status**: Released

Then choose **Save**.

Navigate to the Transaction History to find the sales order ID that was created for the sales item. Note that the service order and related sales order IDs always must be identical.
6.1.2 Create Outbound Delivery for Sales Order

In this step, a sales employee processes the sales order that contains the sales item from the service order. For this lean demo, the sales employee directly creates a delivery and posts a goods issue for the sales order. Another possible scenario would be to create a purchase requisition and purchase order for the sales order, and only then execute the delivery, but this scenario is not in the default scope of the appliance.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| Log on to the Fiori Launchpad:  
  *User: S4H_SD_DEM*  
  *Password: Welcome1*  
  *Language: English*  
  *Client: 100*  | ![Logon Screen](image) |
| Navigate to *Sales Orders*, then choose *Sales Order Fulfillment (Resolve Issues)*.  | ![Sales Orders Screen](image) |
On the **Sales Order Fulfillment Issues** view, choose the **In Order** view and search for the sales order created above. Then navigate to the sales order details.

On the **Issue Details** view, scroll to the **Overdue Items** area. Select the item(s), then choose **Create Delivery**.

Confirm the **Create Delivery** message with **OK**.

Navigate back to the **Home** page by choosing the **SAP** logo.

Display all available apps by clicking on **Home**.

In the apps list, choose **Logistic Execution - Outbound Deliveries**, and choose the **Pick Outbound Delivery** app.
On the Pick Outbound Delivery view, open the value help.

On the Select Outbound Delivery: GI Not Posted view, search for the delivery ID created above, and then navigate to its details.

In the delivery details, maintain the same number for Picking Quantity as entered for Delivery Quantity. Then choose Save.
On the following view, choose *Post GI* (Goods Issue).

Navigate back to the *Home* page by choosing the *SAP* logo.

### 6.1.3 Create Billing Document for Sales Order

After delivering the sales item, the billing clerk creates a customer invoice (billing document). Based on the settings in the appliance, you create individual billing documents for the delivered sales item and for the provided service. You can find the description how to bill the service in the *Bill Service* chapter.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the S4H_SD_DEM user, navigate to <em>Billing Documents</em>, then choose the Create Billing Documents (Billing Due List Items) app.</td>
<td>![Image of SAP Home page with Billing Documents app selected]</td>
</tr>
</tbody>
</table>
On the Create Billing Documents view, select the relevant sales document, then choose Create.

On the Create Billing Documents dialog box, maintain the following data:
- **Billing Type**: Invoice (F2)
- **Billing Date**: <today’s date>
Then choose OK.

On the Billing Document view, review the details, then choose Save.
On the following screen, choose *Post Billing Document*.

Sign out as Shirley Sales.

### 6.1.4 Create Service Confirmation

In this scenario, the service professional creates a service confirmation to confirm the working time of the provided service. The service confirmation is the basis on which customer invoices are created.

Not included in the appliance: If a field service planning and execution application, for example, *SAP Field Service Management* is used, the technician would be able to maintain his/her working time and used parts in an offline application onsite. The information captured offline could later be synced with SAP S/4HANA Service and automatically create service confirmations like described below.
What you will do | What you will see
--- | ---
Log on to the Fiori Launchpad:  
*User:* SERV_MAN  
*Password:* Welcome1  
*Language:* English  
*Client:* 100

On the Fiori *Home* page, choose the *Service Orders* group, then *Service Order Search*.

On the *Search: Service Order* view, search for service order created above, for example with:  
*Posting Date (Time Frame)* is *Today*.  
Then choose *Search*.  
Navigate to the service order details by choosing the *Service Order ID*. 

<table>
<thead>
<tr>
<th>Service Master Data</th>
<th>Service Orders</th>
<th>My Home</th>
<th>Service Contracts</th>
<th>Service-Related Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Confirmation Create</td>
<td>Service Order Create</td>
<td>Service Order Quotation Create</td>
<td>Service Request Create</td>
<td>Service Confirmation Search</td>
</tr>
<tr>
<td>Service Order Search</td>
<td>Service Order Template Create</td>
<td>Service Order Template Search</td>
<td>Service Request Search</td>
<td>Service Order Quotations Search</td>
</tr>
</tbody>
</table>

**Search: Service Orders**

<table>
<thead>
<tr>
<th>Posting Date (Time Frame)</th>
<th>Service Order ID</th>
<th>Service Order Description</th>
<th>Save Search As:</th>
<th>Include View</th>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>b</td>
<td>b</td>
<td>b</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Result List: 4 Service Orders Found

<table>
<thead>
<tr>
<th>Service Order ID</th>
<th>Service Order Description</th>
<th>Sold-To Party</th>
<th>Priority</th>
<th>Posting Date</th>
<th>Net Value</th>
<th>Currency</th>
<th>Lifecycle Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Repair Service</td>
<td>Domestic US Cust...</td>
<td>Medium</td>
<td>12/03/2019</td>
<td>116.55</td>
<td>USD</td>
<td>Released</td>
</tr>
</tbody>
</table>
On the **Service Order** view, choose **Create Follow-Up**.

### Service Order: 8000000085, Repair Service

<table>
<thead>
<tr>
<th>Service Order Details</th>
<th>Items</th>
<th>Notes</th>
<th>Confirmations</th>
<th>Transaction History</th>
<th>Billing</th>
<th>Parties Involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ID:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sold-To Party:</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Processing Data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>External Reference:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Follow-Up

<table>
<thead>
<tr>
<th>Category Description</th>
<th>Transaction Type Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment</td>
<td>Appointment</td>
</tr>
<tr>
<td>Knowledge Article</td>
<td>Knowledge Article</td>
</tr>
</tbody>
</table>

**Service Confirmation**

### Follow-Up – Select Items

<table>
<thead>
<tr>
<th>Transaction Type Description</th>
<th>Product ID</th>
<th>Product</th>
<th>Quantity</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Order</td>
<td>8000000085</td>
<td>10</td>
<td>Maintenance</td>
<td>1.0</td>
</tr>
<tr>
<td>Service Order</td>
<td>8000000085</td>
<td>20</td>
<td>Trad.Good</td>
<td>1</td>
</tr>
</tbody>
</table>

**Choose**

Set the **Status** to **Completed**.

Then choose **Save**.
6.1.5 Complete Service Order

Before the service confirmation can be billed, the service manager reviews whether there are any open items in the service order, and if not, completes the service order.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the Service Orders group, then Service Order Search.</td>
<td><img src="image" alt="Service Orders page" /></td>
</tr>
</tbody>
</table>

On the Search: Service Orders view, search for the service order created above, for example with Posting Date (Time Frame) is Today. Then choose Search. Navigate to the service order details by choosing the Service Order ID.
On the service order view, navigate to the Transaction History to verify that both a confirmation (for the service product) and a goods movement (for the spare part) have been booked. If that is the case, set the service order to completed.

Choose Edit. As Status, choose Completed. Then choose Save.

6.1.6 Release Service Confirmation for Billing

After completing the service order, the service manager releases the service confirmation(s) for billing.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logged on with the SERV_MAN user, on the Fiori Home page, choose the My Home group, then SAP S/4HANA Service.</td>
<td></td>
</tr>
</tbody>
</table>
Open the **Home** menu and choose **Service Operations**.

On the **Service Operations** page, choose **Release for Billing**.

On the **Search: Transactions to be Released for Billing** view, choose **Search**. Select the item(s) belonging to the service confirmation you created above. Then choose **Release for Billing**.
6.1.7 Bill Service

After releasing the service confirmation item(s) for billing, the billing clerk creates the customer invoice. For easiness’ sake, you can stay logged on as a service manager. Alternatively, you can log off as service manager and log on with the S4H_SD_DEM user.

<table>
<thead>
<tr>
<th>What you will do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| Logged on with the SERV_MAN user, on the Fiori Home page, choose the Service-Related Apps group, then open the Create Billing Documents (VF04) app. | ![Create Billing Documents (VF04) app](image)

On the Maintain Billing Due List view, as search criteria maintain: Documents to Be Selected = External Data
Then choose Display Billing List.
In the result list, select the entry belonging to the service confirmation created above. Then choose *Individual Billing Document*.

On the *Invoice (F2) Create: Overview of Billing Items* screen, choose *Save* to create the invoice. A success message *Document 9xxxxxxx saved (no journal entry generated)* is displayed. To create a journal entry in the next step, make a note of the document number.

Navigate back to the *Home* page and *Service-Related Apps* area, then open the *Change Billing Documents* app.

To create a journal entry, as *Billing Document* maintain the document number from the previous step. Choose *Release to Accounting*. 

![Image of Invoice screen](image1.png)

![Image of Home page](image2.png)

![Image of Change Billing Documents](image3.png)