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# 1 PURPOSE

1.1 To provide instruction on how to properly create a service order for labor (with or without materials) in SAP CRM for any commercial situation except those where costs will be charged back to another order or cost center (see Creating a ZINS Order).

# 2 SCOPE – APPLIES TO WHERE & WHEN THE PROCEDURE IS USED

2.1 This procedure applies to all MTS service employees operating in SAP CRM. Typical roles creating a ZOPT service order are the Internal Service Coordinator (ISC) and Service Administration.

# 3 DEFINITIONS AND ACRONYMS

- 3.1 **FSE / SIE**: Field Service Engineer / System Integration Engineer
- 3.2 **Header Line Item**: Defines the upper level service category and execution of the deliverable services.
- 3.3 **Sub-Line Item**: The service products (activities) to be delivered under the Header line item. Each has its own component and price.

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- 3.4 Installed Base/External ID (IBase): Site/Functional location number
- 3.5 ISC: Internal Service Coordinator
- 3.6 **PO**: Purchase Order
- 3.7 SOW: Scope of Work
- 3.8 **STO**: Stock Transport Orders

## 4 GRAPHIC (IF NEEDED)

## 5 **RESPONSIBILITIES**

- 5.1 ISC: Create order, enter SOW, save and/or release order for scheduling as appropriate. Creation of Stock Transport Orders (STO) for parts as required. ClickSchedule task placement as directed, maintenance of order due dates and part status, follow-up order management with delivery staff (FSE,SIE,etc).
- 5.2 **Shared Tool Coordinator**: Schedule and coordinate shipment of shared tools for assigned Field Service Engineer (FSE) at the location/time defined.
- 5.3 **Service Sales**: Define and quote services, review purchase orders (PO), and submit orders through SFDC with all required documentation.

## 6 PROCEDURE

## CREATE

6.1 From the left navigation bar, choose "Service Orders > Create > Service Order."



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Search	🖲 🖃 🛪 Create
Service Confirmations Service Order Guotations Service Orders Service Requests	Service Confirmation Service Order Service Request

## 6.2 Select Transaction Type "ZOPT."

Transaction Type	Transaction Type Description	
ZINS	SingleSett Serv. Ord	
ZOPT	Std. Service Order	

## 6.3 Enter the Installed Base field (IBase).

Order Details 🔐 Edit	
ieneral Data	Processing Data
ID:	Status: Created
Installed Base.*	P0#*
External ID:	PO Date:* 05/25/2015
Site."	Paymit Terms
Sold-To Party:	Net Value: 0
Contact:	Billing Block Status: Nothing Blocked
Description:	Dates
ervice Contract and Warranty	Earliest Start Date."
Service Contract:	Latest Start Date:*
Warranty ID:	Due Date:*
lote	Compliance

6.3.1 Click on the Input Help tab to search IBase.

Installed Base:*	D	-

6.3.2 Enter the customer site number (Functional location number) in the External ID field.

					/
Search For:	Header Usir	ng Header Da	ita	-	-
IBase ID		is	•		0
External ID	•	is	•	-	0
Description		is	•		0
Base Category		is	*	•	0

6.3.3 Select the record shown in the search results.

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- 6.4 Enter the Site Number and click [Enter].
  - 6.4.1 Partner Selection screens will appear for you to select additional partners when multiples exist. Make selections as appropriate.

X Cancel				n ø
Default	ID	Function	Name	Address
2	34939	Contact Person	Charles Carpenter	Charles Carpenter / 1628 Northwoo
	34917	Contact Person	William Woodcock	William Woodcock / 1628 Northwoo
	34915	Contact Person	William Breyer	William Breyer / 1628 Northwood / 1
	34906	Contact Person	Vinnay Kothandapani	Vinnay Kothandapani / 1628 Northw
	34905	Contact Person	Tom Trudel	Tom Trudel / 1628 Northwood / Tro
	34900	Contact Person	Tom Lewczynski	Tom Lewczynski / 1628 Northwood
	34900	Contact Person	THOMAS FROHMAN	Tom Lewczynski / 1628 Northwood
	34900 34936	Contact Person	Tom Lewczynski THOMAS EROHMAN	Tom Lewczynski / 1628 Northwood THOMAS EROHMAN / 1628 Northw Latest Start Date: *
artner Selection D	34900 34936 ocument heade	Contact Person Contact Person 	Tom Lewczynski THOMAS FROHMAN	Tom Lewczynski / 1628 Northwood THOMAS EROHMAN / 1628 Northw Latest Start Date: "
artner Selection D	34900 34936 ocument header	Contact Person Contact Person 	Tom Lewczynski THOMAS FROHMAN	Tom Lewczynski / 1628 Northwood THOMAS EROHMAN / 1638 Northw Latest Start Date: 1
artner Selection D	34900 34936 ocument header h (max. 1 )	Contact Person Contact Parson Webpage Dialog	Tom Lewczynski τηρμάς ερρημμώνι	Tom Lewczynski / 1628 Northwood THOMAS EDOHMAN / 1638 Northw Latest Start Date: " 1
artner Selection D Cancel Default	34900 3.4936 occument header h (max. 1 )	Contact Person Contact Parson Webpage Dialog Function	Tom Lewczynski THOMAS EBOHMAN Name	Tom Lewczynski / 1628 Northwood THOMAS EBOHMAN / 1638 Northwood Latest Start Date: " 1
artner Selection D artner Selection D Cancel Default	34900 34036 occument header h (max. 1 ) ID 516916	Contact Person Contact Person Contact Dereon F Webpage Dialog Function Ship-To Party/ServiceReci	Tom Lewczynski THOMAS EROHMAN Name Exova Defiance	Tom Lewczynski / 1628 Northwood THOMAS EBOHMAN / 1638 Northwood Latest Start Date: 1 Mark & Address Exova Defiance / 1150 W.Maple / 1

6.4.2 If contract(s) are available, a pop-up box will appear. Select a contract if appropriate for the order or click [No Assignment] in the top left corner.

No	Assignment]	<b>-</b>	-					
	ID	Item	Description	Contract End	Contract Start	Open Quan	Description	Product
	820000882	20	Taxable cus	03/31/2016	04/01/2015	0.000	BLANKET PO	PGO
	820001049	10	Testing Paygo	05/06/2016	05/06/2015	0.000	BLANKET PO	PGO
	820000882	10	Taxable cus	03/31/2016	04/01/2015	0.000	BLANKET PO	PGO
	820000961	10		04/28/2016	04/28/2015	0.000	BLANKET PO	PGO

**NOTE**: If a contract is applied; PO number, date, terms, and funding source will default from the contract.

- 6.5 Enter and/or verify the customer PO number and customer PO date (if not populated by contract).
- 6.6 Enter Due Date of Service.

	Original Due Date:	11/12/2023	
	Scheduled Finish Date:		
Note			

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6.7 Select the appropriate Commercial Situation indicating how the order is being funded.



6.8 **US Only**: Enter "Funding Source" as appropriate based on PO received and sales input in SFDC.

**NOTES**: This information will auto populate if a contract was assigned to the order. If entering a warranty order, select WAR in this field.

Compliance		
	Funding Source:*	•
	Govt Identifier:	<b>•</b>

- 6.9 Enter a short description of the order reason in the Description field.
- 6.10 Enter any internal administrative notes in the Note field.

	Service Contract:	
	Warranty ID:	
Note		

- 6.11 Confirm Sales and Service Organization assignment by opening the Organizational Data assignment block.
  - 6.11.1 If applicable, change data to reflect the appropriate sales/service organization data.

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Service A	Administration/ISC	Awareness _	Formal <u>X</u>

r Organizational Data	dit   Determinatio	n Log			
Sales			Service		
Sales Org. Unit:	SORG.1100	MTS Systems Corporation	Service Org. Unit:	AMR_US_SRV	US Test Service
Sales Organization:	SORG.1100	MTS Systems Corporation	Service Organization:	AMR_US_SRV	US Test Service
Distribution Channel:	04	MT&S Order Services			
Division:	01	General			
Sales Office:					
Sales Group:					

- 6.12 To add descriptive text that will print on subsequent customer documentation or print out on the FSE work tasks, go the Notes assignment block.
  - 6.12.1 Click [New].

• Notes	New	
INo result four	nd K	

# FSE Note:

6.12.2 Select "Scheduling and Work Notes" as the text type and enter notes

**NOTE**: If order will contain local and inter-company delivery content, enter this type of note to notify the FSE to coordinate delivery schedule with the FSE in the affiliate office.

# **Customer Facing Note:**

6.12.3 Select "Header Note" as the text type and enter notes.

Back   📴	lew 🛛 🗙 Cancel			
	Text Type:*			
2.51 Kal		0001	Header Note	
Text	PU		The second se	
Text	60	ZS01	Scheduling and Work Notes	

- 6.13 Confirm that all parties involved are correct by opening the Parties Involved assignment block.
  - 6.13.1 If the employee who **sold** the service is someone other than the assigned Service Sales Engineer on the site, update the Order Engineer partner.
- 6.14 Enter the Travel/Expense sub-line items for the SOW to be performed.

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#### NOTES:

- The Travel header line will automatically populate. If there are no travel related items applicable to the order, do not add any sub-lines related to this header.
- Do <u>not</u> manually enter numbers in the "item" column. They must be system assigned.

Ite	ms Ed	lit List					
	Show	All Ite	ems			-	
Ins	ert 👕 🤅		py from To	emplate ∣ More∍			
ъ	Edit	Ref	Item	Product ID		Qty	Product
	2		10	TRAVELXP	٥	1	TRAVEL EXPENSE HDR

- 6.14.1 Enter applicable sub-line items for the Travel category.
  - 6.14.1.1 Enter the header line item (10 in this case) in the Ref field.
  - 6.14.1.2 Enter the Product ID code and quantity, click [Enter].
  - 6.14.1.3 Repeat for each travel related sub-line item.

Ollow.	/ 11 110							
ert 🗊	🗈   Cop	y from To	emplate   More≠					
Edit	Ref	Item	Product ID		Qty	Product	Item Category	
2		10	TRAVELXP	đ	1	TRAVEL EXPENSE HDR	EXP Header Item	•
2	10	11	TRVZONE	đ	1	ZONE CHARGE	Travel Time	•
2		20	CALIBRATIONOP	ð	1	CALIBRATION SVC OPTIMIZED	CAL Header	•
	Edit	Edit Ref	ent     Image: Copy from Transmission       Edit     Ref     Item       Image: Copy from Transmission     10       Image: Copy from Transmission     20	Control         part temps           ent         I         Copy from Template   More⇒           Edit         Ref         Item         Product ID           Image:	Principal         Image: Construction of the second o	Principal         Image: second	Image: series of the series	Image: series of the series

- 6.15 Enter remaining header and sub-line items for the SOW to be performed. (Repeat these steps for any required header/sub-line items).
  - 6.15.1 Header line items:
    - 6.15.1.1 Enter product ID only and click [Enter].
      - Header Products in a ZOPT indicate whether or not the subline items under this header will be;
        - 1. SERVICEOP: Optimized (sent to Zinier)
        - 2. SERVICENO: Non-optimized (**not** sent to Zinier)
        - 3. SERVICEIC: Inter-Company (performed by an MTS service employee located in another sales organization)

6.15.2 Sub-line items:

6.15.2.1 Enter appropriate header line item in the reference field and then the product ID and quantity, click [Enter].

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The following products should <u>never</u> be entered on a service order. They are for use on Time/Activity confirmations only;

ADMINTIME LOSTTIMECUST LOSTTIMEMTS EXCEPTIONPART PURCHASEDPART TRAVELTIME

6.16 Confirm price by clicking on the edit icon to the left of the item.

	Sho	w: All It	tems			•		
In	sert 🍞 🗈	Copy	from Templa	te   More∗				
ъ	Edit	Ref	Item	Product ID		Qty	Product	Item Cat
	2		10	TRAVELXP	٥	1	TRAVEL EXPENSE HDR	EXP Hea
	2	10	11	TRVZONE	٥	1	ZONE CHARGE	Travel Ti
	2		20	CALIBRATIONOP	٥	1	CALIBRATION SVC OPTIMIZED	CAL Hea
	2 🚤	20	21	C20KA	٥	1	20 KIP_100KN AXIAL L/C MTS	Billable S
					٥			
	1000							

- 6.16.1 Go to the Price Detail assignment block and confirm the line item pricing is accurate. Make changes as necessary.
- 6.16.2 Click [Back] to return to the main order page.
- 6.17 **If** the line items have been authorized as a warranty/post warranty (per warranty procedure) or Free of Charge:
  - 6.17.1 Change the item category of the header line item to "non-billable" using the drop down menu.
  - 6.17.2 Change the Accounting Indicator to the appropriate code based on the individual situation using the drop down menu.

Ins	Show: sert 🗊	All Ite	ems Copy	from Template   Mo	re=	1			
ъ	Edit	Ref	Item	Product ID		Q	Product	Item Category	N
	2		10	TRAVELXP	٥	1	H- TRAVEL & ADMIN	EXPENSE Header	0.00
	2	10	11	TRVZONE	٥	1	ZONE CHARGE	Billable Travel Time	3
	2		20	CALIBRATIONNO	٥	1	H- CALIBRATION SER	NON BILLABLE Header -	0.00
	2	20	21	C20KA	٥	1	20 KIP_100KN AXIAL L	ZCEP NOp CAL Header	
	2				D.		-	ZZZX NON BILLABLE He	ader

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S	Show: All Items			•							
Ins	ert 🗍	0	Copy	from Template   More	¥						
ъ	Edit	Ref	Item	Product ID	(	Q	Product	Item Category	Net	Accountin	Status
	2		10	TRAVELXP	0	1	H- TRAVEL & ADMIN	EXPENSE Heade -	0.00		Release
	2	10	11	TRVZONE	0 1	1	ZONE CHARGE	Billable Travel Tirr-	331	-	Release
	2		20	CALIBRATIONNO	0	1	H- CALIBRATION SER	NON BILLABLE H-	0.00	Regular Wa-	Release
	2	20	21	C20KA	0	1	20 KIP_100KN AXIAL L	Billable Service -	634	K1 Regular W	arranty e
	2 0			٥					K2 Post Warranty K3 Specific Warranty		
										K4 Free of Ch	narge

**NOTE**: In the case of equipment system warranty, each sub-line component must represent the system equipment number and have a currently valid warranty date (see component assignment below).

6.17.3 Enter the Warranty Incident Request number in the appropriate field in the order header.



- 6.17.4 Enter the Warranty Incident Request number in the Purchase Order field in the order header.
- 6.17.5 Enter the authorized value (from the approved Warranty Incident Request) in the appropriate field in the order header.



6.17.6 Enter a new Warranty Requestor record in the Parties Involved section of the service order. This should represent the MTS employee who requested the warranty.

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414031	intoittou	Lun Lor				
ert 🎁		oposal   Propose Alternatives				
Edit	Partner Function			Partner ID	Name	
2	Bill-To Part	y	•	139426	MAGN	
2	Contact Per	rson	•	3081019	Adam k	
2	Employee F	Responsible	*	E-00002186	MR Ral	
2	Order Engin	neer	•	E-00001068	MR Mic	
2	Payer Ship-To Party/ServiceRecipient		•	139426	MAGNA	
2			*	522131	MAGNA	
2	Site		•	522131	MAGNA	
2	Sold To Par	rty		139379	MAGNA	
	Assigned F	SE	-			
Billing Attachm	Z0000ORE         Order Engineer           0000004         Payer           Z000PFSE         Preferred FSE           Z000RFSE         Required FSE           20000055         Ship-To Party/ServiceRecipient           Z0000005         Ship-To Party/ServiceRecipient		^			
	rt j Edit 2 2 2 2 2 2 2 2 2 2 2 3 2 3 2 3 2 3	It is all ites inforced       rt     I Addross Pr       Edit     Partner Fur       Bill-To Part       Contact Per       Employee F       Order Engir       Payer       Ship-To Pa       Ste       Sold To Part       Assigned F       2000PFSE       2000PFSE       200000055       20000002	Address Proposal     Propose Alternatives       Edit     Partner Function       Image: Imag	Index information     Extraction       Image: Address Proposal   Propose Alternatives       Edit     Partner Function       Image: Bill-To Party     Image: Solid Person       Image: Contact Person     Image: Solid Person	Address Proposal     Propose Alternatives       Edit     Partner Function     Partner ID       2     Bill-To Party     139426       2     Contact Person     3081019       2     Employee Responsible     E-00002186       2     Order Engineer     E-00001068       2     Ship-To Party/ServiceRecipient     522131       2     Site     522131       2     Sold To Party     139379       Assigned FSE        20000ORE     Order Engineer       20000FSE     Preferred FSE       20000FSE     Required FSE       20000055     Ship-To Party/ServiceRecipient	

6.17.7 If System Warranty accounting indicator selected: Enter component ID in each sub-line by clicking on the Edit icon to the left of the item and confirm valid warranty.

	Sho	w: All I	tems			*		
In	sert 🎁 🗈	j   Copy	from Templa	te   More -				
Ъ	Edit	Ref	Item	Product ID		Qty	Product	Item Ca
	2		10	TRAVELXP	đ	1	TRAVEL EXPENSE HDR	EXP He
	2	10	11	TRVZONE	Ø	1	ZONE CHARGE	Travel T
	2		20	CALIBRATIONOP	Ø	1	CALIBRATION SVC OPTIMIZED	CAL Hea
	2 🚤	20	21	C20KA	٥	1	20 KIP_100KN AXIAL L/C MTS	Billable S
					٥			
	Cho.				5 <u>11</u>			

6.17.7.1 Go to the Reference Object assignment block and enter the "Component ID" of the equipment this service will be performed on Select the input help button in the Component ID field.

•	Reference	Objects Edit List		
Ins	ert 🗊			×
ъ	Actions	Installed Base ID	Installed Base Desc.	Component ID
	Û	8551		
1	Û	0		o

6.17.7.2 Enter the site number in the External ID field and click [Search].

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Search For:	Component Usir	ng Header D	•	1			
IBase ID	-	is	•			0	۰
IBase Category	-	is	•		-	0	•
External ID	•	is	•	502626		0	•
Description		is	-			0	•

# 6.17.7.3 Select the equipment on which the service will be provided from *the resulting* list.

earch Criteria										Hide Se
Search For:	Component Us	ing Header Data		•						
Base ID		is	*			0	٥			
Base Category	-	is	-		-	0	۰			
xternal ID		is	-	500909		0	•			
escription		is	-			0	۰			
earch Clear	nstalled Base Co	omponents Found						14.154	LAR T	0.1
installed	Compon I	Description			Object ID	0	•	vanu	Valid To	SOIL
5149	5150	General Dynamics			500909	C		11/04	12/31	C003
5149	41817	SYSTEM			1000342	C		02/05	12/31	
5149	41818	SYSTEM			1000343	С	ine:	02/05	12/31	
5149	41819	SYSTEM			1000344	С		11/11	12/31	
5149	41820	SYSTEM			1000345	C		02/05	12/31	
Reference Ob	jects Edit List									
sert 🗊										
Ast IDees	D Doscriptic	Compono	n	Compo	Object ID		OF	lioct I	Extornal	Marran

Ball Ae... 502812

Ball Aer...

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502812

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6.18	If SOW is clearly defined and the order is ready to be released;	

Ball Aerospace

Ball Aerospace

• For Optimized orders that will be scheduled in Zinier:

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 $\circ$  Change the order status to "Released/Sent to Scheduling" and click [Save].

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- For Non-Optimized orders that will not be scheduled:
  - Change the order status to "Released/Not Sent to Scheduling" and click [Save].

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Status	Created		-
PO #*	E0001 Created		
	E0002 Released / Not Sent to Schedul		
PO Date:	E0003 Released / Sent to Scheduling		
Paymnt Terms	Net 30		
Net Value	965.00	USD	đ
Billing Block Status	Nothing Blocked		

- 6.19 **If SOW is not clearly defined** and order needs to be reviewed before release;
  - 6.19.1 Leave the order in "Created" status and click [Save].
  - 6.19.2 Create a task assigned to yourself for follow-up for review and release of the order.
    - 6.19.2.1 Click the [Create Follow-Up] button at the top of the service order.
    - 6.19.2.2 Select "MTS Task."
    - 6.19.2.3 Assign and Save task per the "How To Create a Task" document.

Save   🗙 Cancel   📴 New 🗈	Create Follow-Up   Print Print Preview	/   More∓		
Order Details 🛛 🖉 Edit				
General Data	Follow-Up Webpage Dialog			
1				9
	Transaction Type Description	Category Description	Transaction Type	
	Interaction Record	Appointment	Y110	
	Credit Memo	Complaints	ZCRV	
	Debit Memo	Complaints	ZDRV	
Service Contract and Warra	Activity Conf.	Service Confirmation	ZCAC	
Service Contract and Warra	Time Confirmation	Service Confirmation	ZCTC	
	Intercompany Service	Service Process	ZISV	
Note	Std. Service Order	Service Process	ZOPT	
Note	Checklist Task	Task	Z030	
Test Header Note- Print on I	Escalation Task	Task	Z031	
	a second a second se	-	1/000	

- 6.20 **If 3rd party services** were included on this order, create a purchase requisition in SAP-ECC following the 3<sup>rd</sup> Party Purchase Requisition process.
- 6.21 <u>If Inter-company</u> Header items are included on this order, create a ZISV intercompany order following the *ZISV Inter-company Order Create* process.

**NOTE**: ZISV order must be created AFTER the complete SOW is defined in the ZOPT order.

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6.22 If physical parts were included on this order, create STO in ECC following the STO work instructions and place on hold if waiting for instructions on where/when to ship the item(s) **OR** issue the parts directly to the appropriate internal order for the service order following those instructions.

## CHANGE:

6.23 Click on Service Order from within your assigned task OR search for the order from the left navigation bar by choosing "Service Orders>Search>Service Order

					Sa	ved Se	arches -	Sold-to loo
	↓ Ser	vice Orders						
	Se	arch					reate	
Home	00				CS 🗆 X	C		
Calendar	S	ervice Confirmations ervice Order Quotatio	ons			0000	Service Cor Service Orc	ntirmation
Accounts & Products	• S	ervice Orders	044046			5	Service Red	quest
Service Orders 🛛 🐂		ervice Requests				1		
Service Contracts	Re	ports			a = ×	1		
Complaints & Returns		•			2 1 4			
Service Operations	•							
5								
Search Criteria							Hide Se	earc
Service Order ID		is	-			00		
Service Order Type	-	is	-	Standard Ser	vice Ord 👻	00		
Business Partner ID		is	-	502812	٥	00		
Status	-	r is	•		•	00		
Search Clear		Save Search As:	Max	imum Number	of Results:	100 /e 🗊		
Result List: 3 Service Or	ders Fo	ound						
PNew 🗈							1	1
Service Servic.	Solo	I-To Party	Prio.	Postin	Net V	C	Status	Us
810003948	BAL	LAEROSPACE &	Med	07/15/	1,200.00	U	Compl	Cc
810004011 BW T	BAL	LAEROSPACE &	Med	07/28/	120 00	LL.	Compl	Cc
	DAL	ENERGOINGE G	mou	011201	120.00	0	oomp	00

When additional items need to be added to an optimized order and the work is in the following status;

- 6.23.1 Released/Sent to Scheduling
  - 6.23.1.1 Add the additional sub-line item(s) in reference to the header line (i.e. parts, activities, etc.)

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- 6.23.1.2 Change the status of the sub-line to "Released/Sent to Scheduling."
- 6.23.1.3 Change the order status to "Create" and then back to "Released/Sent to Scheduling."
- 6.23.1.4 Save the order.
- 6.23.2 Make other changes as appropriate by selecting the "Edit" tab of the appropriate assignment block.

## CANCEL/REJECT-

#### Task:

- 6.24 Open the order.
- 6.25 Select the Edit button in the Items assignment block of the order.
- 6.26 Select the appropriate rejection code for each applicable line item.
- 6.27 Skip to step 6.29.

## Order:

- 6.28 If **all** items on the order need to be rejected (and no activity has begun),
  - 6.28.1 Select the "More" option from the top of the order and choose "Reject all Items" and then select the appropriate reason code.

JUNICE													
General	Data					Proc	essing Data	1					
		ID: 82000	D618					Status:	In Proce	ISS			
	Sold-T	o Party: BALL /	AEROS	SPACE & TECH			PON	lumber:	test def	1008			
Contact: Mr. Sigurd Johnson Employee Responsible: Michelle H Bintliff Funding Source: Commercial			PO Date: 08/		08/03/2	)8/03/2015							
		Net Value: Payment Terms: Net 2			0.0		USD USD						
				Net 30									
	Govt lo	lentifier: None					Billing Block	Status:	Nothing	Blocked			
	Des	cription:					Shipping	Cond.:	Ground	Transport			
	Collect	ive No.: 55445				Date	s						
							Contra	ct Start:					
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		st											3
Items	Edit L												-
ltems tem Lis	t Eait L										Sho	w Searc	:h
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ltems tem Lis E F	t tef It	Product ID TRAVELXP	Qty 1	Product H- TRAVEL & A	Net 0.00	Cur USD	Status Compl	Exter 502812	lobj	Pla	Rejectio Order er	w Searc n Re try er	
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Items EF 2 2 2	t tef It 10 10 11 20	Product ID TRAVELXP TRVZONE CALIBRATI	Qty 1 1	Product H- TRAVEL & A ZONE CHARGE H- CALIBRATIO	Net 0.00 331 0.00	Cur USD USD USD	Status Compl Compl	Exter 502812 502812 502812	lobj	Pla 08/	Rejectio Order er Order er Order er	w Searc n Re try er try er try er	-
Items E F 27 27 27 27	t tef It 10 10 11 20 20 21	Product ID TRAVELXP TRVZONE CALIBRATI C20KA	Qty 1 1 1	Product H- TRAVEL & A ZONE CHARGE H- CALIBRATIO 20 KIP_100KN A	Net 0.00 331 0.00 570	Cur USD USD USD USD	Status Compl Compl Compl	Exter 502812 502812 502812 502812	lobj	Pla 08/	Rejectio Order er Order er Order er Order er	w Searc n Re try er try er try er try er	
Items Item Lis E F 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	t tef It 10 10 11 20 20 21 30	Product ID TRAVELXP TRVZONE CALIBRATI C20KA ROUTINENO	Qty 1 1 1 1	Product H- TRAVEL & A ZONE CHARGE H- CALIBRATIO 20 KIP_100KN A H- ROUTINE M	Net 0.00 331 0.00 570 0.00	Cur USD USD USD USD USD	Status Compl Compl Compl Compl	Exter 502812 502812 502812 502812 502812	lobj	Pla 08/	Rejectio Order er Order er Order er Order er Order er	w Searc n Re try er try er try er try er	

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6.28.2 Change the order status to "Ready to Complete."

6.29 Save the order.

# 7 ASSOCIATED QUALITY RECORDS – AS STATED IN THE QUALITY RECORDS LIST

Required Record

# 8 **REFERENCE FORMS / TEMPLATES / DOCUMENTS**

Form / Template / Document Title	Location

# 9 CURRENT REVISION'S TRAINING REQUIREMENTS

Training requirements are determined by the document owner.

- 1. Select Awareness **and/or** Formal training requirements.
- 2. List (below) the functions or groups that require the training.

Select (mark X)	Training Type	Training Definition
	Awareness	Awareness training is conducted by communication, which is sent/delivered by the approver/author/owner of the document to the affected employees/groups.
x	Formal	Formal training requires the approver/author/owner to collect/store evidence that the affected employees/groups were trained.

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# Functions/Groups that require Awareness to this procedure:

- Awareness: List here the function(s) or group(s) that require Awareness training.
- Formal: List here the function(s) or group(s) that require Formal training.

## 10 REVISION HISTORY & APPROVAL

	Revision History							
Rev	Description of Change	Author	Effective Date					
E	Changes to support new Zinier Scheduling System	Michelle Bintliff	11/2/23					
D	Remove component requirement from all sub- lines except those assigned to system warranty	ReAnna Skowronek	6/1/2020					
С	Remove most references to TSC, remove 6.17 step to attach WIR form, update workflow	Celeste Butter	1/4/2019					
В	Additional steps and clarification to section 6.17 for Warranty/FOC.	Michelle Bintliff	9/15/16					
A	Initial Release	Michelle Bintliff	3/1/16					

Approval of Current Revision				
Name / Function	Signature	Date		
Michelle Bintliff / Sr Business Systems Analyst – Service	Michelle Bintliff	11/2/2023		
Michelle Bintliff / Sr Business Systems Analyst – Service	Michelle Bintliff	06/01/2020		
Michelle Bintliff / Global Sr. Service Business Systems Analyst	Michelle Bintliff	1/14/2019		

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	MTS Systems Corporation – MTS Test	FS-AD 3222	E
Title:		Page #:	
Create/Change/Reject ZOPT Service Order		17 of 17	
Procedure Owner(s) – list Functions: Service Administration/ISC		Revision's Training Requirements – select one or both (per section #9):           Awareness _         Formal X	

Michelle Bintliff / Global Service Administration Manager	Michelle Bintliff	9/15/16
Michelle Bintliff / Global Service Administration Manager	Michelle Bintliff	3/1/16