	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3223</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZOPT_ZINS Order Review &amp; Completion</b></p>		<p>Page #: <b>1 of 8</b></p>	
<p>Procedure Owner(s) – list Functions: <b>Global Service Administration</b></p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b></p>	

## CONTENTS

1	Purpose.....	1
2	Scope – applies to where & when the work instruction is used.....	1
3	Definitions and Acronyms.....	1
4	Graphic (if needed) .....	1
5	Responsibilities .....	2
6	Procedure .....	2
7	Associated Quality Records – as stated in the Quality Records List .....	5
8	Reference Forms / Templates / Documents .....	6
9	Current Revision's Training Requirements .....	6
10	Revision History & Approval .....	6

### 1 PURPOSE

- 1.1 To provide instruction on how to properly review, revise and close CRM Service Orders.


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

- 2.1 This procedure applies to all Service Administration personnel processing orders for completion/billing.

### 3 DEFINITIONS AND ACRONYMS

- 3.1 SAP CRM: CRM system used to enter information.

### 4 GRAPHIC (IF NEEDED)

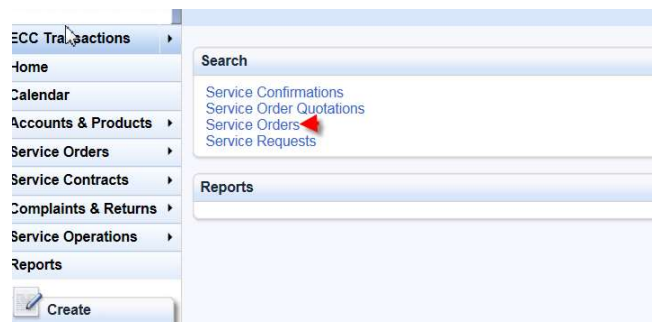
	<p align="center"><b>QMS Procedure</b>  <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number:  <b>FS-AD 3223</b></p>	<p>Rev.:  <b>F</b></p>
<p>Title:  <b>ZOPT_ZINS Order Review &amp; Completion</b></p>		<p>Page #:  <b>2 of 8</b></p>	
<p>Procedure Owner(s) – list Functions:  <b>Global Service Administration</b></p>		<p>Revision's Training Requirements – select one or both (per section #9):  <b>Awareness X      Formal</b></p>	

**5 RESPONSIBILITIES**

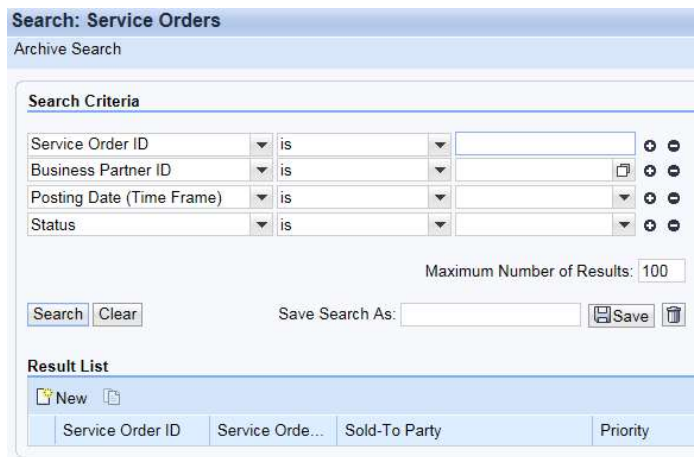
5.1 Service Administrator will review orders in “Ready for Billing Review” on a scheduled basis and process the order completion. Applicable orders will require a billing confirmation be created to trigger internal and/or external billing.

**6 PROCEDURE**

6.1 From the left navigation bar, choose “Service Orders > Search > Service Orders.”




6.2 Select the search criteria “Status” – is- “Ready for Billing Review” .



6.3 Select a Service Order from the resulting list to be reviewed.

6.4 Confirm that all line items listed on the order are in a Completed status except for any physical part items.

	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3223</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZOPT_ZINS Order Review &amp; Completion</b></p>		<p>Page #: <b>3 of 8</b></p>	
<p>Procedure Owner(s) – list Functions: <b>Global Service Administration</b></p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b></p>	

6.5 Confirm that all Activity & Time confirmations are in a Completed status:

6.5.1 Open the Confirmations assignment block and make a note if not all confirmations are in “completed” status. This indicates an issue that will need to be resolved before continuing.

Confirmations				
ID	Description	Executing Service Employee	Created On	Status
811001512		Mr. Robert Thomas Edgar	07/23/2015	Completed

6.5.2 Work with FSE, TSC, or manager to resolve issues as appropriate to complete all confirmations as necessary.

6.6 If the Service Order is not billable and all confirmations are complete, skip to step **6.15**.

6.7 If the Service Order is billable (internally against a contract or externally to the customer)

6.7.1 Open the Transaction History assignment block and click on the order number of the first confirmation.

6.7.1.1 Time Confirmations:

6.7.1.1.1 Make note of how many days there were time confirmations submitted (for comparison to the number of Zone/Add day charges)

6.7.1.2 Activity Confirmations:


6.7.1.2.1 Make note of all physical parts used and their quantities (for comparison/addition to line items on the order)

6.7.1.2.2 Make note of any purchased part items including the description and cost information provided by the FSE (for comparison/addition to the line items on the service order)

6.7.1.2.3 If a physical part line item remains in an “open” status, Determine the cause and make corrections to Complete

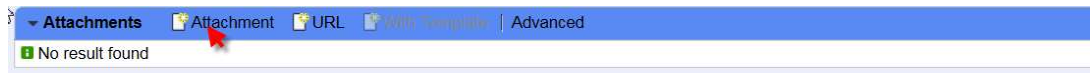
6.8 Manually add new sub-line items on the Service Order for any additional parts that should be charged to the customer. If locally purchased, calculate the price based on the cost information provided by the FSE on their activity confirmation

6.9 Review each line item to confirm the planned qty/hours matches the qty/hours the FSE indicated should be invoiced. Make manually adjustments as appropriate based on PO type (i.e. fixed price), minimum order qty, etc.

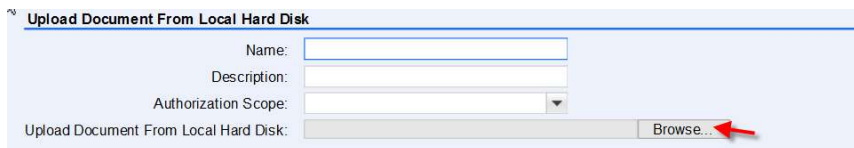
	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3223</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZOPT_ZINS Order Review &amp; Completion</b></p>		<p>Page #: <b>4 of 8</b></p>	
<p>Procedure Owner(s) – list Functions: <b>Global Service Administration</b></p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b></p>	

**Note:** The order and used quantities much match on each line item or the item will not allow selection for the billing confirmation.


- 6.10 Manually adjust the Travel related items to reflect the actual number of Zone/Add day charges to be billed.
- 6.11 Review the following information and make any necessary corrections:
  - Payment terms
  - Payer address
  - Sales tax
  - Inco and payment terms
  - Currency
- 6.12 Confirm the final order pricing reflects the actual work completed and the expected invoicing amount.
- 6.13 Change the line item status of any parts listed on the order as appropriate.
  - 6.13.1 If issued from the FSE warehouse, change to “Complete.”
  - 6.13.2 If listed on the order but never used, change to “Cancelled.”
- 6.14 Review and resolve any system errors.
- 6.15 If the service/ acceptance report was not captured electronically through the system, attach a copy of the document (emailed acceptance, manual service report, etc.) to the service order.
  - 6.15.1 From the Attachments section of the order, click on the Attachment option;

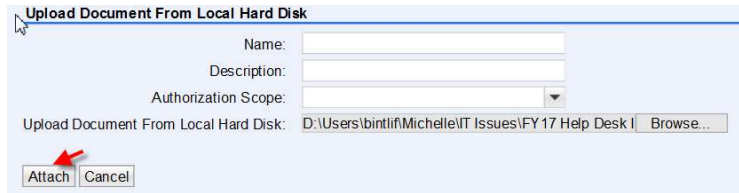


- 6.15.2 Click the Browse button to locate and select the appropriate document on your computer.



- 6.15.3 Click on the Attach button to attach the selected the file to the order.

	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3223</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZOPT_ZINS Order Review &amp; Completion</b></p>		<p>Page #: <b>5 of 8</b></p>	
<p>Procedure Owner(s) – list Functions: <b>Global Service Administration</b></p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b></p>	



6.16 Update Status, Save, Create Billing Confirmation:

**Billable Order:** (ZOPT-against contract or customer PO):


- 6.16.1 Click [Save]
- 6.16.2 Click on the [Create Follow-Up] option in the menu.
- 6.16.3 Create Billing Confirmation by following the “Create Billing Confirmation” work instructions.
- 6.16.4 Return to the Service Order by clicking on the [Back] button.
- 6.16.5 Change the status of the order to “Ready to Complete”.
- 6.16.6 Click [Save]

**Non-Billable Order:** (ZINS, ZISV, ZOPT-Warranty, ZOPT-FOC):

- 6.16.1 Change the status of the order to “Ready to Complete” and Click [Save]
- 6.16.2 **if** order was a pre-paid installation on a Project (cost settling to WBS element),
  - 6.16.2.1 Download a copy of the Close Out Package from Zinier.
  - 6.16.2.2 Load the service report /acceptance document(s) into the appropriate project folder in POND following the “How To Load Service Report into POND” instruction document.

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

Required Record
FS-AD-3238 Create Billing Confirmation

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3223</b>	Rev.: <b>F</b>
Title: <b>ZOPT_ZINS Order Review &amp; Completion</b>		Page #: <b>6 of 8</b>	
Procedure Owner(s) – list Functions: <b>Global Service Administration</b>		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b>	

**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
X	Awareness	Awareness training is conducted by communication, which is sent/delivered by the approver/author/owner of the document to the affected employees/groups.
	Formal	Formal training requires the approver/author/owner to collect/store evidence that the affected employees/groups were trained.

**Functions/Groups that require Awareness to this procedure:**


- Awareness: List here the function(s) or group(s) that need to be aware of this procedure.
  - Internal Service Coordinators
  - Service Administration
- Formal: List here the function(s) or group(s) that require Formal training.

**10 REVISION HISTORY & APPROVAL**

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3223</b>	Rev.: <b>F</b>
	Title: <b>ZOPT_ZINS Order Review &amp; Completion</b>		Page #: <b>7 of 8</b>
Procedure Owner(s) – list Functions: <b>Global Service Administration</b>		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b>	

Revision History			
Rev	Description of Change	Author	Effective Date
F	Changes to support new Zinier Scheduling System	M. Bintliff	11/8/2023
E	Updated 6.17 to limit S3 closure to projects only	M. Bintliff	2/9/21
D	Updated 6.17.3.2 to include project training report upload to POND – Overall review	M. Bintliff	9/14/18
C	Added step 6.16 for capture of non-electronic service report/ acceptance documents	M. Bintliff	4/18/17
B	Update to 6.7 & 6.11 related to Travel Charges	M. Bintliff	6/15/16
A	Original Release	M. Bintliff	3/1/16

Approval of Current Revision		
Name / Function	Signature	Date
Michelle Bintliff/ Sr Business Systems Analyst	<i>Michelle Bintliff</i>	11/8/2023
Michelle Bintliff/ Sr Business Systems Analyst	<i>Michelle Bintliff</i>	2/09/2021
Michelle Bintliff/ Global Service Administration Manager	<i>Michelle Bintliff</i>	9/17/2018
Michelle Bintliff/ Global Service Administration Manager	<i>Michelle Bintliff</i>	4/18/17
Michelle Bintliff/ Global Service Administration Manager	<i>Michelle Bintliff</i>	6/15/16
Michelle Bintliff/ Global Service Administration Manager	<i>Michelle Bintliff</i>	3/1/16

	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3223</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZOPT_ZINS Order Review &amp; Completion</b></p>		<p>Page #: <b>8 of 8</b></p>	
<p>Procedure Owner(s) – list Functions: <b>Global Service Administration</b></p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X      Formal</b></p>	