	QMS Procedure **MTS Systems Corporation – MTS Test**	Document Number: **FS-AD 3223**	Rev.: **B**
Title: **ZOPT_ZINS Order Review & Completion**		Page #: **1 of 8**	
Procedure Owner(s) – list Functions: **Global Service Administration**		Revision's Training Requirements – select one or both (per section #9): **Awareness _ Formal _**	

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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)

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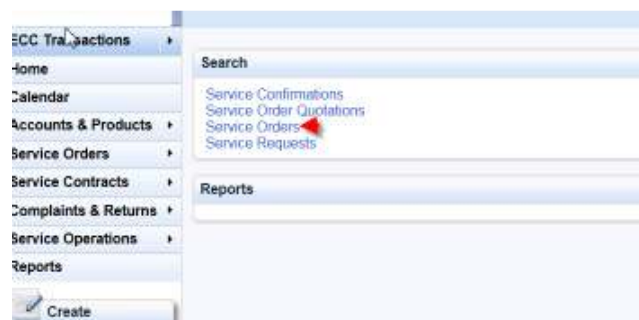
6.2   Select the search criteria "Status" – is- "Ready for Billing Review" .

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

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

6.5   Review all Activity & Time confirmations:

    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

6.6   If the Service Order is not billable **_or_** is tied to a Maintenance contract and all confirmations are complete, skip steps 6.7 through 6.13.

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 following the "Manual Activity Confirmation Create, Change" work instruction.

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 Run Order Reconciliation Report in CRM or run Transaction code KOB1 in ECC to confirm goods issue of parts and time postings (labor hour quantity) as appropriate.

    6.9.1 Make note of any time & material labor hours listed on the Service Order.

    6.9.2 Return to the Service Order by using the [Back] button

6.10 Manually adjust any time & material hour on the Service Order to reflect the actual number of hours to be invoiced.

6.11 Manually adjust the Travel related items to reflect the actual number of Zone/Add day charges to be billed.

6.12 Review the following information and make any necessary corrections:

- Payment terms
- Payer address
- Sales tax
- Inco and payment terms
- Currency

6.13 Confirm the final order pricing reflects the actual work completed and the expected invoicing amount.

6.14 Change the line item status of any parts listed on the order as appropriate.

    6.14.1 If issued from the FSE warehouse, change to "Complete."

    6.14.2 If listed on the order but never used, change to "Cancelled."

6.15 Review and resolve any system errors.

6.16 **If the service order is Non-Billable** (ZINS, ZISV, ZOPT-Warranty, ZOPT-FOC):

    6.16.1 Change the status of the order to "Ready to Complete"

    6.16.2 Click [Save]

    6.16.3 **If** order was a pre-paid installation,

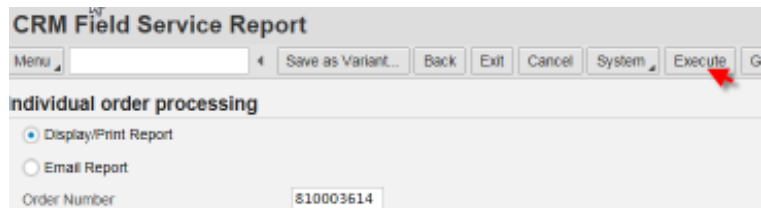   6.16.3.1 Complete the S3 notification in ECC by following BPWI 100127.

6.16.3.2   If order tied to a WBS element number;

    6.16.3.2.1   Click on the CRM Service Order Report in the menu on the left side of CRM

    6.16.3.2.2   Enter the Service Order number and Execute report

    6.16.3.2.3   Save a copy of the report to your desktop

    6.16.3.2.4   Load the file into the project folder in POND following the "How To Load Service Report into POND" document.

6.17   **If the service order is Billable**:

6.17.1   Click [Save]

6.17.2   Click on the [Create Follow-Up] option in the menu

6.17.3   Create Billing Confirmation by following the "Create Billing Confirmation" work instructions.

6.17.4   Return to the Service Order by clicking on the [Back] button

6.17.5   Change the status of the order to "Ready to Complete"

6.17.6   Click [Save]

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

Required Record
FS-AD-xxxx Create Billing Confirmation

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.
	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.
- 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**
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/ Global Service Administration Manager	*Michelle Bintliff*	6/15/2016