	QMS Procedure **MTS Systems Corporation – MTS Test**	Document Number: **FS-AD 3238**	Rev.: **A**
Title: **Create Billing Confirmation**		Page #: **1 of 5**	
Procedure Owner(s) – list Functions: **Service Administration**		Revision's Training Requirements – select one or both (per section #9): **Awareness _ Formal X**	

CONTENTS

1	**PURPOSE**

1.1   Provide instruction on how to properly create a billing confirmation from a ZOPT order to trigger either internal or external debit memo request and invoice in SAP –ECC.

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

2.1   This procedure applies to all Service Adminstration personnel closing service orders.

3	**DEFINITIONS AND ACRONYMS**

3.1   **Contact**: Person/End user contacting MTS for assistance.

3.2   **SAP CRM**: CRM system used to enter information.

3.3   Header Line Item: Represents the category and delivery process of the services to be delivered.

	QMS Procedure MTS Systems Corporation – MTS Test	Document Number: **FS-AD 3238**	Rev.: **A**
Title: **Create Billing Confirmation**		Page #: **2 of 5**	
Procedure Owner(s) – list Functions: **Service Administration**		**Revision's Training Requirements – select one or both (per section #9):** **Awareness _ Formal X**	

3.4 **Sub-Line Item**: The service products (activities) to be delivered under the Header line item. Each has its own component and price.

4   GRAPHIC (IF NEEDED)

5   RESPONSIBILITIES

5.1 **Internal Service Coordinator/Service Administration**: Create Billing Confirmation in reference to the original order as required for the accurate creation of internal and/or external debit memo requests/invoice generation in SAP-ECC.

6   PROCEDURE

6.1 Upon completion of the "*Service Order Completion (ZOPT, ZINS, ZISV)*" work instruction and from within the ZOPT service order, Click [Create Follow Up]

6.2 Select the "Billing Confirmation" transaction type.

Transaction...	Category Description	Transaction Type Descrip
Y110	Appointment	Interaction Record
YSVR	CRM Service Request	MTS Service Request
ZCRV	Complaints	MTS Credit Memo
ZDRV	Complaints	MTS Debit Memo
Y010	E-Mail	BP E-Mail
Y007	Interaction Log	MTS Interaction Log
ZCAC	Service Confirmation	Activity Conf.
ZCBC	Service Confirmation	Billing Conf.
ZCTC	Service Confirmation	Time Confirmation

6.3 Select all items to be invoiced on this billing confirmation and click [Choose]

NOTE: Unless you will be creating multiple, partial billings to meet specific requirements, all items should be selected.

	Tr...	Transaction Ty...	Transaction ID	Item...	Product ID	Product	Quantity	Unit	
	i	Standard Field...	810003634	10	TRAVELXP	H- TRAVEL & ADMIN	1	EA	
	i	Standard Field...	810003634	11	TRVZONE	ZONE CHARGE	1	PU	
	i	Standard Field...	810003634	20	REPAIROP	H- REPAIR SERVICES	1	EA	
	i	Standard Field...	810003634	21	STDRPRH...	**USE STDRPRHOURGE	8.0	HR	

6.4   Confirm that all line items came in correctly and the total Net Value is accurate.

6.5   Change the status of the Billing Confirmation to "Complete".

6.6   Click [Save]

6.7   If the order is now completely invoiced and the work is complete;

6.7.1   Return to the Service Order by clicking [Back]

6.7.2   Change the Status of the Service order to "Ready to Complete"

6.7.3   Click [Save]

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

Required Record
Service Order Completion (ZOPT, ZINS, ZISV)

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.

Functions/Groups that require Awareness to this procedure:

- Awareness: List here the function(s) or group(s) that needs to be aware of this procedure.
- Formal: List here the function(s) or group(s) that requires Formal training.

10   REVISION HISTORY & APPROVAL

Revision History			
Rev	**Description of Change**	**Author**	**Effective Date**
1	Original Release	M Bintliff	3/1/2016

Approval of Current Revision		
Name / Function	**Signature**	**Date**
Michelle Bintliff/ Global Service Administration Manager	*Michelle Bintliff*	3/1/2016