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Internal a	and Technical Service Coordinators	Awareness _	Formal <u>X</u>			

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1 PURPOSE

1.1 To provide instruction on how to properly create a ZISV Inter-company service order for charge back of labor (with or without materials) to a retail order in another Sales Organization

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 ZISV service order are the Internal Service Coordinator (ISC) and Technical Service Coordinator (TSC).

3 DEFINITIONS AND ACRONYMS

- 3.1 **FSE**: Field Service 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 **TSC**: Technical Service Coordinator
- 3.8 **SOW**: Scope of Work
- 3.9 **STO**: Stock Transport Orders

4 GRAPHIC (IF NEEDED)

5 **RESPONSIBILITIES**

- 5.1 **TSC**: Create order, define and enter scope of work (SOW), save and release order for scheduling as appropriate. Notify ISC of parts requirements and part assignment, delivery, and date data upon scheduling via Tasks. Notify Shared Tool Coordinator of tool requirements via Tasks.
- 5.2 ISC: Create order, enter sales defined SOW, save order in process for TSC review or release order for scheduling as appropriate. Creation of Stock Transport Orders (STO) for parts as required. Assign tasks to TSC for review/release of orders and parts follow-up. Confirm parts shipments to TSC via "Parts Tasks."
- 5.3 **Shared Tool Coordinator**: Schedule and coordinate shipment of shared tools assigned Field Service Engineer (FSE) at the location/time defined by the TSC. Confirm availability and reservations to TSC via "Tools Task."

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6 PROCEDURE

IMPORTANT NOTE:

Customer site master data must be extended to the inter-company sales org performing the service

CREATE

6.1 While viewing the Retail Service Order, Click on the [Create Follow-up] button

td. Field Serv Ord.: 81000325	ý.				Cittark - (
ISAG MCarce Dinew Cas	ste Follow-Up Print 1	Part Preview 1 Actions 1 Nore+			8.6
· Service Order Details 02108	-				
General Data			Processing Data		
Ð	810003259		Baas	Released : Not Sent to Schodul	
Installed Same *	TI G3H0E	Plonda HIBD Co., Ltd	System Status	Released	
External ID	516487		PD Narber*	lest.	
544*	Honda RIND Co.: US	0	PO Date **	10/11/2015	10
Sold-To Party	Honata RIMO Car, Ltd.		Payment Terms	Net 10	185
Contact	Jone Doe	0	Net Value:	1,068.00 050	0
Description			Billing Block Status	Nothing Blocked	
Bervice Contract and Warranty			Detes		
Service Contract			Earliest Start Date *	10/11/2015	10
Warranty (D)			Latest Start Data**	10/21/2015	
Note			Due Date."	19/30/2015	10
			Compliance		
			Funding Sourca*	Commercial	
			The Rest Street		

6.2 Select ZISV Intercompany Order

ransaction	Category Description	Transaction Type Description
Y110	Appointment	Interaction Record
YSVR.	CRM Service Request	MTS Service Request
ZCRV	Complaints	MTS Credit Memo
ZDRV	Complaints	MTS Debit Memo
Y01D	E-Mail	BP E-Mail
Y007	Interaction Log	MTS Interaction Log
ZCAC	Service Confirmation	Activity Conf.
ZCTC	Service Confirmation	Time Confirmation
ZISV	Service Process	Intercompany Service
Z031	Task	Escalation Task

6.3 From the pop-up box, select the Travel Header line item along with all applicable Intercompany Header and sub-lines to be copied into the ZISV order and click on the [Choose] button

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Choose							6	1.00
à Tr.	Transaction Ty	Transaction ID	item	Product ID	Product	Quantity	Unit	
.0	Standard Field	810003259	10	TRAVELXP	H- TRAVEL & ADMIN	1	EA	C
D	Standard Field	810003259	20	CALIBRAT	INTER-CO CALIBRATION	1	EA	C
0	Standard Field	810003259	21	C20KAA	20 KIP_100KN AXIAL L/C	1	EA	C
0	Standard Field	810003259	22	CALSTDFEE	FIXED FEE SERVICE ITEM	1	EA	
0	Standard Field	810003259	23	C20KA	20 KIP_100KN AXIAL L/C	1	EA	C
0	Standard Field	810003259	30	ROUTINEIC	INTER-CO ROUTINE MAL	া	EA	C
0	Standard Field	810003259	31	MRMCON	ROUTINE MAINTENANCE	1	EA	C

- 6.4 Enter the Retail Order number in the PO field
- 6.5 In the Organizational Data section of the order, enter the Sales Org Unit and Service Org Unit of the organization that will be performing the work.

Sales				Service				
Sales Org. Unit.	SGrpTKY	0	Sales Group TKY		Service Org. Unit	ASIA_JAP_SRV	Ø	Japan Test Service
Sales Organization	SORG.5100	0	MTS Japan Ltd.		Service Organization:	ASIA_JAP_SRV	0	Japan Test Service
Distribution Channel	04	D.	MT&S Order Services					
Division	.01	0	General					
Sales Office	SOFFS008	0	Sales Office S008					
Sales Group	SGrpTKY	0	Sales Group TKY					

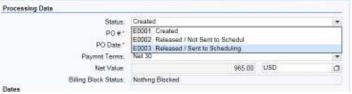
- 6.6 **If** order is being created by ISC/TSC located in the **Retail Sales Org**;
 - 6.6.1 Leave the order in "Created" status and click [Save].
 - 6.6.2 Create a task assigned to the **ISC for the ZISV Sales Org** to review and release the order.
 - 6.6.2.1 Click [Create Follow-Up] at the top of the service order screen.
 - 6.6.2.2 Select "MTS Task."
- 6.7 If order is being created by the ISC located in the I/C ZISV Sales Org;
 - 6.7.1 **SOW is clearly defined** so the order is ready to be released;
 - 6.7.1.1 For Optimized Orders that will be scheduled via Click Schedule;

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6.7.1.1.1 Change the status of each Header line item to "IC OPT Header"

- 11 1	1 Copy for	n Tangai	a C Maar								-	-40
Artes	1000 100	Iter	PHONE C	Guerky	194		Possi	Iner Calmere 1	196		04.	the
	10.		TRAVELOP :		EA.	0	H THASLA KIRSH	AC THANK PRODUCT			24	Creat
121	20		OAUBRATICHIC		64	-1	WER CO DALGRATION SCRIPT.	ICIVIAL Reader		1	RY.	Cost
0	24	20	C1964		23	12	20 KP 1000 KOALLC 45TH F	20PS IC Opt Reader	-		BY.	Court
12	20	20	CUBOA	1	FA.	10	SLKP, HERRISON, LICHTS	ACT IC HOM Healer.			21	Ches
0	58		PERMIT		10.	10	MICH CO ROUTINE NAME TOWN	IC NOT HOUSE	*	14	21	Onin
12	23	10	NERCONVICE.	1.1	14.	- 6	HEATING SAMULTINGS CO. CO.	IC ARRIV	•	14	81	Cred
0				7		- 64						

6.7.1.1.2 Change the Order Status to "Released/Sent to Scheduling"





- 6.7.1.2 For Non-Optimized Orders that will not be scheduled;
 - 6.7.1.2.1 Change the Order Status to "Released/Not Sent to Scheduling"
 - 6.7.1.2.2 Save the order.
- 6.7.2 **SOW is not** clearly defined so the order needs to be reviewed by TSC before release;
 - 6.7.2.1 Leave the order in "Created" status and click [Save].
 - 6.7.2.2 Create a task assigned to the TSC to review and release the order.
 - 6.7.2.2.1 Click the [Create Follow-Up] button at the top of the service order.
 - 6.7.2.3 Select "MTS Task."
 - 6.7.2.4 Assign and Save task per the "How To Create a Task" document.

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Order Details			
General Data	Follow-Up - Webpage Dialog		No. of Concession, Name
1			
	Transaction Type Description	Category Description	Transaction Type
	Interaction Record	Appointment	Y110
	Credit Memo	Complaints	ZORV
	Debit Memo	Complaints	ZDRV
Service Contract and Warra	Activity Conf.	Service Confirmation	ZCAC
Service Connaccana Haira	Time Confirmation	Service Confirmation	ZCTC
	Intercompany Service	Service Process	ZISV
Note	Std. Service Order	Service Process	ZOPT
A CONTRACTOR OF A CONTRACTOR O	Checklist Task	Task	2030
Test Header Note- Print on I	Escalation Task	Task	Z031
	MTS Task	Task	Y030

- 6.7.3 If 3rd party services were included on this order, create a purchase requisition in SAP-ECC following the 3rd Party Purchase Requisition process.
- 6.7.4 If shared tools are required on this TSC created order:
 - 6.7.4.1 Create a task assigned to the TSC notifying them that the STO has been entered and pending their instructions.
 - 6.7.4.1.1 Click the [Create Follow-Up] button at the top of the service order.
 - 6.7.4.1.2 Select the "Shared Tool Task"
 - 6.7.4.1.3 Assign and Save task per the "How to Create a Task" document
- 6.7.5 If physical parts were included on this order, and the order is being created by:
 - 6.7.5.1 Internal Service Coordinator:
 - 6.7.5.1.1 Create STO in ECC following STO work instructions and place on Hold.
 - 6.7.5.1.2 Create a task assigned to the TSC notifying them that the STO has been entered and pending their instructions.
 - 6.7.5.1.2.1. Click the [Create Follow-Up] button,
 - 6.7.5.1.2.2. Select "Service Parts Task."
 - 6.7.5.1.2.3. Assign/save task per "How to Create a Task"

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- 6.7.5.2 Technical Service Coordinator:
 - 6.7.5.2.1 Create a task assigned to the ISC requesting STO creation.
 - 6.7.5.2.1.1. Click [Create Follow-Up] button
 - 6.7.5.2.1.2. Select "Service Parts Task,"
 - 6.7.5.2.1.3. Assign and save task per "How to Create a Task"

CHANGE:

6.8 ISC/TSC located in the **I/C ZISV Sales Org** should review and update the order following steps 6.7 above.

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.

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Internal and Technical Service Coordinators		Awareness _ Formal X	

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 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
1	Original Release	Michelle Bintliff	3/1/16

Approval of Current Revision			
Name / Function	Signature	Date	
Michelle Bintliff / Global Service Administration Manager	Michelle Bintliff	3/1/16	

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