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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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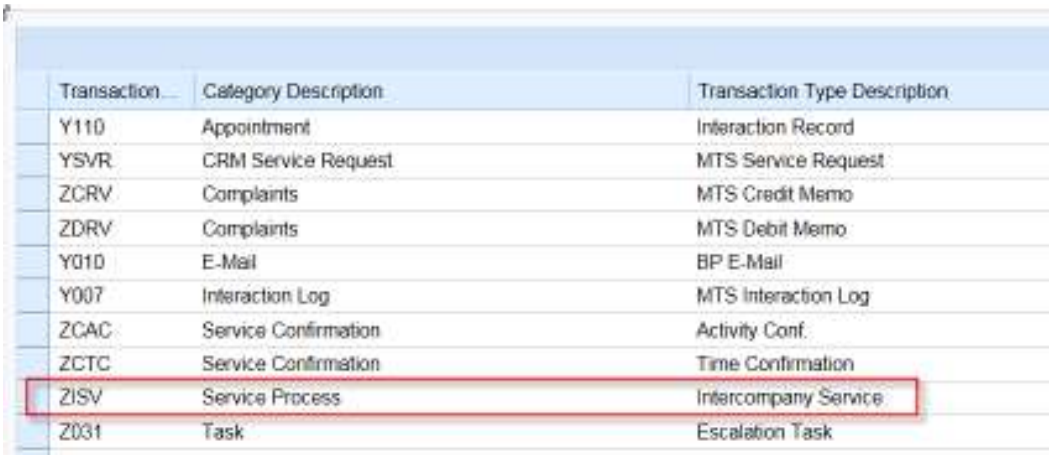
6 PROCEDURE

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

6.2 Select ZISV Intercompany Order



Transaction...	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
Y010	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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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.

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"

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

6.7.1.1.3 Save the order.

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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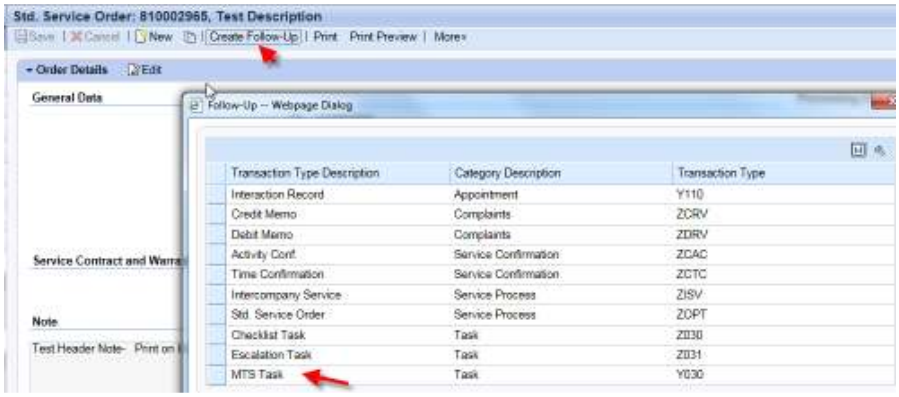

6.7.3 **<u>If 3rd party services</u>** were included on this order, create a purchase requisition in SAP-ECC following the *3rd Party Purchase Requisition process.*

6.7.4 **<u>If shared tools</u>** 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 **<u>If physical parts</u>** 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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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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