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| Test ScriptSAP S/4HANA - 18-09-20 | public |
| Service Order Management (41Z\_DE) |

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# Purpose

Service orders record the details of a one-off service agreed upon by a service provider and a service recipient.

You can do the following:

* Create a service order as a follow-up transaction of another transaction (for example, a service request)
* Create follow-up transactions from a service order (for example, a service confirmation)
* Create a service order as a follow-up transaction of a service order template

This scope item covers the creation of service orders in which diverse services and service parts can be planned. Service technicians execute the services and optionally make use of related service parts. After the service order is confirmed and completed, an invoice is created.

# Prerequisites

This section summarizes all prerequisites to conducting the test in terms of systems, users, master data, organizational data, and other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| SAP S/4HANA | Accessible via SAP Fiori launchpad. Your system administrator provides you with the relevant URL. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

These roles are examples provided by SAP. You can use them as templates to create your own roles.

For more information about business roles, refer to the Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide).

Fiori Frontend Roles

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Customer Service Manager (Customer Management) | SAP\_BR\_CUSTOMER\_SERVICE\_MGR | N/A | N/A |  |
| Inventory Manager | SAP\_BR\_INVENTORY\_MANAGER | N/A | N/A |  |
| Billing Clerk | SAP\_BR\_BILLING\_CLERK | Billing Clerk | SAP\_SD\_SP\_BILLING |  |

Application Business Roles

The business roles in the following table contain authorization and navigation objects specific to the SAP S/4HANA Service application. Your system administrator can use them as templates to create customer-specific business roles with the appropriate authorizations.

|  |  |
| --- | --- |
| Name (Role) | ID (Role) |
| S4CRM UIU - Service Professional | SAP\_S4C\_UIU\_SRV\_PRO |
| CRM Role for UIU Framework | SAP\_CRM\_UIU\_FRAMEWORK |

In addition to these Service-specific authorizations, generic SAP application access must be granted by your system administrator. The system administrator assigns all required application business roles to your system user.

Note For detailed information about roles and authorizations, refer to the SAP S/4HANA security guide at <https://help.sap.com/viewer/product/SAP_S4HANA_ON-PREMISE> > Implement.

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company has been created in your system during activation. The organizational structure reflects the structure of your company. The master data represents, for example, materials, customers, and vendors, depending on the operational focus of your company.

Use your own master data or the following sample data to go through the test procedure.

|  |  |  |  |
| --- | --- | --- | --- |
| Data | Sample Value | Details | Comments |
| Sold-To Party | 10100001 | Customer domestic 01 |  |
| Employee Responsible | 9980000022 | Barbara Lee | Alternatively use your own employee responsible with business role Service Professional. |
| Service Employee Group | 2000010 | Service Back Office |  |
| Service Profile | 7 x 24 | Mo-Su 0-24h |  |
| Service Profile | 5 x 10 | Mo -Fr 7-17 h |  |
| Response Profile | First | First Level Response Time |  |
| Response Profile | Standard | Second Level Response Time |  |
| Service Product | CSSRV\_01 | Maintenance |  |
| Expense | SRV\_02 | Service Expense |  |
| Sales Item / Service Part | TG11 | Trad.Good 11,PD,Reg.Trading |  |
| Sales Organization | 1010 | Dom. Sales Org |  |
| Service Organization | Service Org | Dom. Service Org US |  |

## Post Goods Receipt for Material

Purpose

As a prerequisite to execute the procedure described in this test script, before creating a service quotation or service order make sure that the material you want to consume is available on stock. In our example, we use spare part TG11 (Trad.Good 11,PD,Reg.Trading). Post a goods issue for the relevant material as described below.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Logon to SAP S/4HANA Fiori launchpad as an Inventory Manager (SAP\_BR\_INVENTORY\_MANAGER). | The Home screen is displayed. |  |
| 2 | Open App | Choose Warehouse Processing: Post Goods Movement. | The Goods Receipt Other page is displayed. |  |
| 3 | Enter Goods Movement Type Details | On top of the screen, select the following entries:* Goods Receipt
* Other
* Goods Movement Type: 501 (Receipt w/o purchase order into unrestricted-use stock)
 | You have selected the correct movement type. |  |
| 4 | Enter Goods Receipt Details | In the Material screen area, as Material maintain TG11.In the Quantity screen area, as Qty in Unit of Entry maintain a number, for example, 10 PC.In the Where screen area, maintain the following data:Plant: 1710Storage location: 171AThen choose Enter. | You have maintained the details for the goods receipt. |  |
| 5 | Post Goods Receipt | Make sure that the Item OK option is selected.Then choose Post. | The material is available on stock. |  |

# Overview Table

This scope item consists of several process steps provided in the table below.

If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.

You can find all other apps not included on the homepage using the search bar.

If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose Settings > App Finder .

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | App/Transaction | Expected Results |
| [Create Service Quotation](#unique_8) [page ] 9 | Service Professional | Create Service Orders Quotation | A service order quotation is created. |
| [Create Service Orders](#unique_9) [page ] 11 | Service Professional | Create Service Orders | A service order is created. |
| [Create Service Confirmation](#unique_10) [page ] 14 | Service Professional | Create Service Orders | A service confirmation for the service order is completed and an Internal order is created that reflects the posting in CO.A time sheet is created that reflects the posting of the actual hours of the service technician. |
| [Release Service Confirmation for Billing](#unique_11) [page ] 17 | Service Professional | Release for Billing | A billing document request for the completed service confirmation is created. |
| [Create Billing Document](#unique_12) [page ] 18 | Billing Clerk | Create Billing Documents (Billing Due List Items) | The billing document is created. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Create Service Quotation

### Create Service Quotation as Preceding Document and a Follow-up Service Order

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager (SAP\_BR\_CUSTOMER\_SRVC\_MGR). | The Fiori Launchpad with access to the Manage Service Orders application is displayed. |  |
| 2 | Open Create Service Order Quotation Application | Choose the Create Service Orders Quotation application tile. | The list report page is displayed. |  |
| 3 | Create New Service Quotation | If the window Select Transaction Type is showing up, select the transaction type SRVQ (Order Quotation). | The Order Quotation: New page is displayed. |  |
| 4 | Enter Service Order Details | In the Quotation Details assignment block, maintain the following entries using the input help:Description: for example, Product defectiveSold-To Party: 10100001 (Customer domestic 01) | You have maintained service order details.The Select Organizational Data Web page dialog is displayed. |  |
| 5 | Select Organizational Data | If the Select Organizational Data Web page dialog appears, select the responsible organizational unit as responsible service organization.Service Organization: Dom Service Org USNote The Dom Sales Org US sales organization needs to be assigned to the service order as well. Check in the Organization assignment block that this org. unit is assigned, or if it is not, maintain the assignment manually.Sales Organization: Dom. Sales Org US | Organizational units for sales and service are assigned to the order quotation. |  |
| 6 | Select Partner Data | If the Partner Selection Document header dialog box appears, select:Service Employee Group : SRV\_BO (Service Back Office). | A service team is assigned to the quotation order. |  |
| 7 | Add Quotation Order Details | In the Quotation Details assignment block, maintain the following entries:Contact: for example, Susan MillerPriority: HighRequested End: A date in the future | You have maintained further quotation details. |  |
| 8 | Enter Quotation Order Items | In the Items assignment block, enter a service item and a spare part.Product ID (1): CSSRV\_01 (Maintenance)Quantity: 1Quantity Unit: HRProduct ID (2): TG11 (Trad.Good 11)Higher-Level Item: 0010 ( Reference CSSRV\_01 as higher-level service item, by entering the item number of the Maintenance product in the Higher-Level Item column of the Trad. Good item.1Quantity Unit: PC | Two items have been maintained.The Item Category for item CSSRV\_01 is determined as Service Item.If the material (TG11) is a sub item of a service item (CSSRV\_01), the item category will be determined as Service Part. Otherwise the item category will be set as Sales Item by default. |  |
| 9 | Change Quotation Status | In the Quotation Details assignment block, release the order quotation by selecting:Status: Released | The order quotation has been released. |  |
| 10 | Save | Choose Save. | A service quotation order has been created.The status of the Quotation will be automatically completed. A Service Order will be created automatically. You can check the created Service Order under TAB "Transaction History". |  |

## Create Service Orders

### Create Service Order Without Preceding Document

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager (SAP\_BR\_CUSTOMER\_SRVC\_MGR). | The Fiori Launchpad with access to the Manage Service Orders application is displayed. |  |
| 2 | Open Create Service Order Application | Choose the Create Service Orders application tile. | The list report page is displayed. |  |
| 3 | Create New Service Order | If the window Select Transaction Type is showing up, select the transaction type SRVO (Service Order). | The Service Order: New page is displayed. |  |
| 4 | Enter Service Order Details | In the Service Order Details assignment block, maintain the following entries using the input help:Description: for example, Product defectiveSold-To Party: 10100001 (Customer domestic 01) | You have maintained service order details.The Select Organizational Data Web page dialog is displayed. |  |
| 5 | Select Organizational Data | If the Select Organizational Data Web page dialog appears, select the responsible organizational unit as responsible service organization.Service Organization: Dom Service Org USNote The Dom Sales Org US sales organization needs to be assigned to the service order as well. Check in the Organization assignment block that this org. unit is assigned, or if it is not, maintain the assignment manually.Sales Organization: <Dom. Sales Org US> | Organizational units for sales and service are assigned to the service order. |  |
| 6 | Select Partner Data | If the Partner Selection Document header dialog box appears, select:Service Employee Group : SRV\_BO (Service Back Office) | A service team is assigned to the service order. |  |
| 7 | Add Service Order Details | In the Service Order Details assignment block, maintain the following entries:Contact: for example, Susan MillerPriority: HighRequested End: a date in the future | You have maintained further service order details. |  |
| 8 | Change the Employee Responsible | In the assignment block Parties Involved, make sure that a service technician is assigned to the service order:Partner Function: Employee ResponsibleName: <name of the service technician>, for example Barbara Lee (SERV\_EMPL).If you do not have all assignment blocks displayed, choose the link “Personalization” (the cog icon) and personalize it for assignment block Parties Involved. | A service technician is assigned to the service order. |  |
| 9 | Enter Service Order Items | In the Itemsassignment block, enter a service item (1), a spare part (2) and an expense item (3).Product ID (1): CSSRV\_01 (Maintenance)Quantity: 1Quantity Unit: HRProduct ID (2): TG11 (Trad.Good 11)Higher-Level Item: 0010 ( ReferenceCSSRV\_01as higher level service item, by entering the item number of the Maintenance product in the Higher-Level Item column of the Trad. Good item.)Quantity: 1Quantity Unit: PCProduct ID (3): SRV\_02 (Service Expenses)Quantity: 1Quantity Unit: EA | Three items have been maintained.The Item Category for item CSSRV\_01 is determined as Service Item.If the material (TG11) is a sub item of a service item (CSSRV\_01), the item category will be determined as Service Part. Otherwise the item category will be set as Sales Item by default.The Item Category for item SRV\_02 is determined as Service Expenses. |  |
| 10 | Change Service Order Status | In the Service Order Details assignment block, release the service order by selecting:Status: ReleasedNote You can only release a service order that is error free. | The service order has been released. |  |
| 11 | Save | Save your entries.Make a note of the number of the service order for further reference. | A service order has been created. |  |

## Fulfill Service

### Create Service Confirmation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

The service order shall be processed by a service technician on site. The service technician searches for service orders that are assigned to him and selects the service order that he will work on next. After processing the service items on site, the service technician enters the confirmation data.

If there is no additional follow-up action necessary to fulfill the service order, the service technician can set the service confirmation and the corresponding service order to Completed. This status is also necessary to bill the whole process.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager (SAP\_BR\_CUSTOMER\_SRVC\_MGR). | The Fiori Launchpad with access to the Manage Service Orders application is displayed. |  |
| 2 | Search for Service Orders | On the Home screen, choose Search: Service Orders. | The Search: Service Orders page is displayed. |  |
| 3 | Enter Search Options | Search for the service orders that are assigned to the service technician. Use the following search criteria:Belonging ToisMeOr Service Order IDThen choose Search. | The Result List is displayed all service orders that are assigned to the service technician. |  |
| 4 | Select Service Order | In the Result List, select the service order for which you would like to create a service confirmation. | The Service Order page is displayed. |  |
| 5 | Create Follow-up | In the Service Order page, choose Create Follow-Up. | The Follow-Up Web page dialog is displayed. |  |
| 6 | Select Service Order Information | In the Follow-Up Web page dialog, select the Service Confirmation category with transaction type Confirmation. | The Follow-Up - Select Items Web page dialog opens. |  |
| 7 | Select Items | In the Follow-Up - Select Items Web page dialog, select the service item(s) you want to confirm, for example, CSSRV\_01 (Maintenance) and TG11 (Trad.Good 11, and choose Choose. | The selected service items are copied into the service confirmation.The Confirmation: New page is displayed. |  |
| 8 | Edit Service Confirmation Item | Optional: In the Confirmation: New page, in the Items assignment block, you can now maintain details per service item, for example, you can set the exact duration of the service process.Choose the Edit icon next to item number. | The Confirmation Item page is displayed. |  |
| 9 | Maintain Service Confirmation Item Details | Optional: On the Confirmation Item page, maintain the following values:Start of Work: if relevant, update the start dateActual Duration: if relevant, update the durationStatus : CompletedThen choose Back. | You have maintained item details.You have navigated back to the Confirmation: New page. |  |
| 10 | Enter the details of the Expense Item | Choose the Items tab or scroll down to the items area.Choose the action Edit for the line item which contains the expense item <SRV\_02>. | The details view of the expense item is displayed |  |
| 11 | Enter an amount for the expense item | Enter an amount for the expense item, for example, 80 EUR.Choose Back.Choose Save. | The actual expense has been entered. |  |
| 12 | Change Status in Service Confirmation Details | In the Service Confirmation Details assignment block, change the status to Completed. | The service confirmation status is Completed. |  |
| 13 | Save | Choose Save.Make a note of the service confirmation number for further reference. | A service confirmation has been created. |  |
| 14 | Display Preceding Service Order | To set the preceding service order to Completed, in assignment block Transaction History, select the service order. | The Service Order page is displayed. |  |
| 15 | Complete Service Order | In assignment block Service Order Details, select Edit and change the status to Completed.Important Note: You will not be able to create a billing document request if the service order is not set to completed. | The service order is completed. |  |
| 16 | Save | Choose Save. | The service order is saved. |  |
| 17 | Log off | You can now sign out as service technician. | You have logged off. |  |

### Release Service Confirmation for Billing

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

If the service confirmation and the service order both have the status Completed, the service manager can release the service confirmation items for billing.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager (SAP\_BR\_CUSTOMER\_SRVC\_MGR). | The Fiori Launchpad with access to the Manage Service Orders application is displayed. |  |
| 2 | Open Release for Billing application | Choose the TAB Operations.Choose the Release for Billing application tile. | The Application for Operation is displayed. |  |
| 3 | Find your order items to be Released for Billing | In the search area on the top,Enter the confirmation ID in the Search field Transaction ID.Choose Go. | The service orders which have been completed are displayed in the list. |  |
| 4 | Release order items | Select the item of the service order you want to release for billing and choose Release for Billing. | The selected transactions and items should be Released for billing on Success. |  |
| 5 | Log off | You can now sign out as service manager. | You have logged off. |  |

## Billing the Service

### Create Billing Document

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

In this activity, you create an invoice for the service confirmation items that you have released for billing in the previous step. You can execute this step in the Fiori launchpad as described below. As an alternative, in the S/4 backend you can use transaction VF04.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on to the Fiori Launchpad | Log on to the Fiori Launchpad with the role Billing Clerk (SAP\_BR\_BILLING\_CLERK). | The Fiori Home screen is displayed. |  |
| 2 | Open Release for Billing application | Choose the Release for Billing application tile under the TAB Operations. | The list report page is displayed. |  |
| 3 | Find your items to be Released for Billing | In the search area on the top,Enter the ID of your service confirmation in the Search field.Choose Go. | All items of the respective confirmation which have been confirmed and completed in the service order, are displayed in the list. |  |
| 4 | Release a confirmation item | Select the items and choose the action ‘Release for Billing’. | The selected transactions and items should be Released for billing on Success.If any error occurs, you should see a popup with a list of Errors returned from this action. |  |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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