Best Practice Guide – Configuration Service Process Flow

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Document History

Before you start the implementation, make sure you have the latest version of this document. You can find the latest version at the following location: http://service.sap.com/instguides -> *SAP Solution Extensions -> SAP Waste and Recycling Applications by PROLOGA -> Release 5.0*

The following table provides an overview of the most important document changes.

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Glossary

Attention

Note

1 Introduction

This document describes the configuration of a S/4HANA system for using service components.

The focus of the Service Order Guide is to give instructions on how to set the system to:

- Create a service contract
- Create a service order and copy the service contract items into the service order
- Confirm a service order and copy the service order items into the service confirmation

A service contract describes which services are to be performed for which objects and under which conditions. It is a long-term agreement concerning the content and scope of services that are to be performed for a customer. It consists of header data and item data.

A service order can be a result of a service contract. It is described as a short-term agreement between a service provider and a customer. It contains header data, location and account assignment data, object data, settlement data, operation data and component data. The service order is used to document service tasks and customer service tasks.

Service items exist within a Service Order and are defined as specific products.

After completing a service order a service confirmation reports all necessary data, such as working time, expenses incurred and service parts used while performing a service, back. Based on this data a billing receipt can be triggered - which is not part of this document.

More information about the Service Contract, Service Order and Service Confirmation can be found in the SAP help at http://help.sap.com.

Please note, that the described process focuses mainly on a logistical workflow. When using these settings, billing after a logistical confirmation will not be triggered. Therefore, settings have to be changed according to individual needs if billing wants to be used.

The configuration described in this document can be found in system CD1/100 and CT1/100.

2 Partner Determination Procedure

Partner determination procedures are sets of rules for how the system works with business partners during transaction processing. They bring together partner functions and access sequences and include additional information.

A procedure is defined and assigned to a transaction type. The system works with the partners involved in the transaction type according to the rules that were specified in the procedure. The settings in the procedure apply to both partners determined automatically and to those entered manually.

In order to edit the settings, go to *SPRO > Service > Basic Functions > Partner Processing > Define Partner Determination Procedure.*

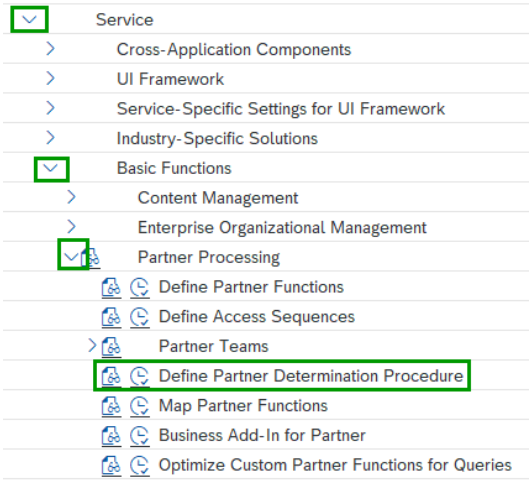


Figure 1 Path to "Define Partner Determination Procedure"

The Service Contract Header, Service Header, Service Item and Confirmation Header were copied and modified for our purposes.

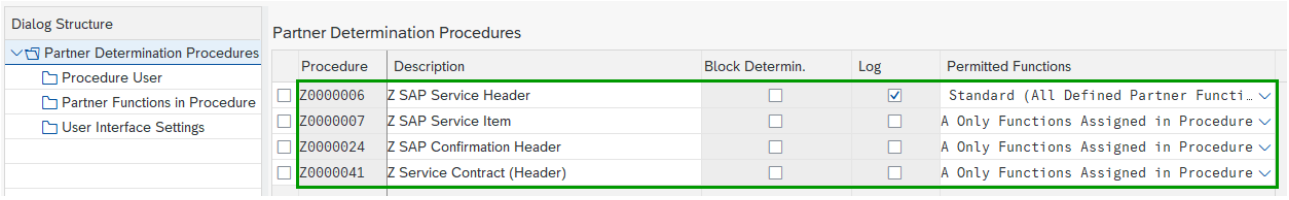


Figure 2 Defined Procedures

2.1 Service Contract

Copy Service Contract (Header) (00000041) and save for example as Z Service Contract (Header) (Z0000041).

While copying, go to *Partner Functions in Procedure* and delete Employee Responsible (CRM) (00000014) and Contact Person (CRM) (00000015). These partner functions are not necessarily used within the defined workflow and keep producing errors for the user. A service contract can be created without defining an employee responsible and a contact person.

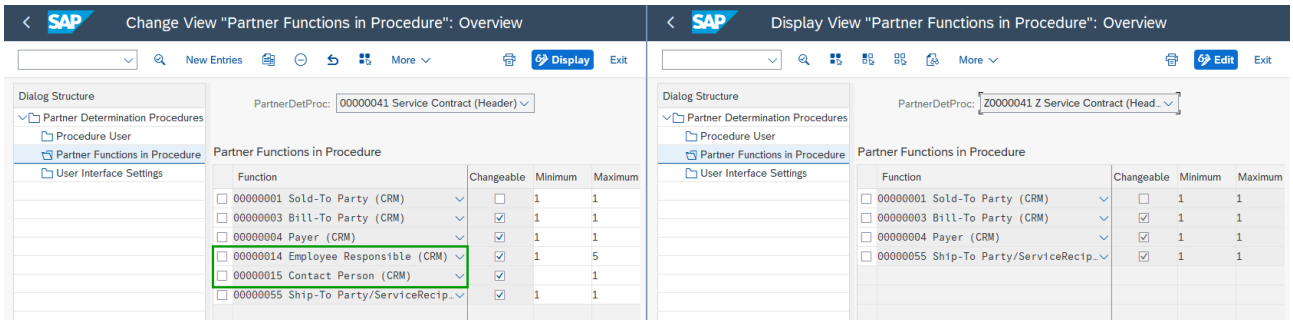


Figure 3 Partner Functions in Procedure Service Contract (Header)

Go to *User Interface Settings* and delete 00000015 Contact Person (CRM) as *Partner Function 2*. Therefore, only the 00000001 Sold- To Party (CRM) is checked as entered during service order creation.

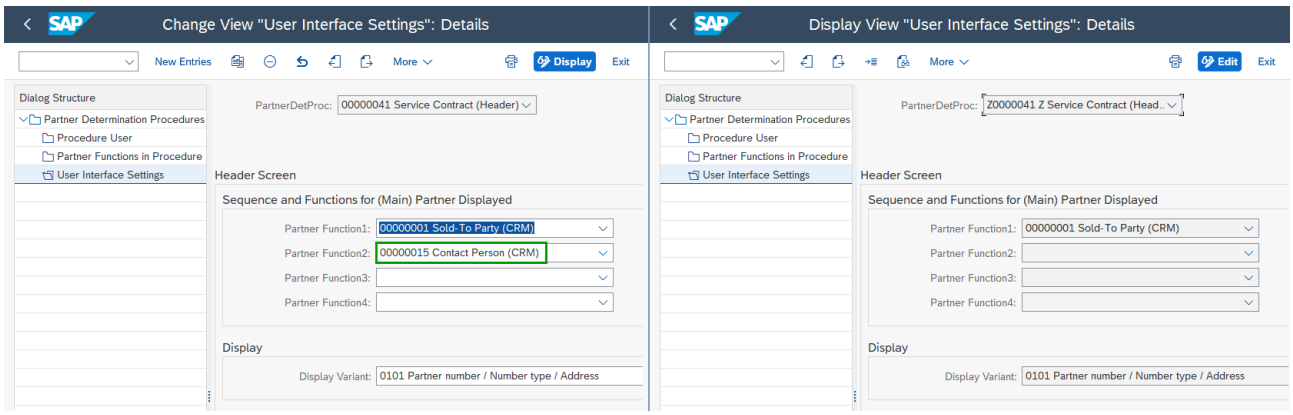


Figure 4 User Interface Settings Service Contract (Header)

2.2 Service Header

Copy Service Header (00000006) and save for example as Z Service Header (Z0000006).

While copying, go to *Partner Functions in Procedure* and delete Employee Responsible (CRM) (00000014), Contact Person (CRM) (00000015) and Service Employee Group (CRM) (00000056). These partner functions are not necessarily used within the defined workflow and keep producing errors for the user. A service order can be created without defining an employee responsible, a contact person and a service employee group.

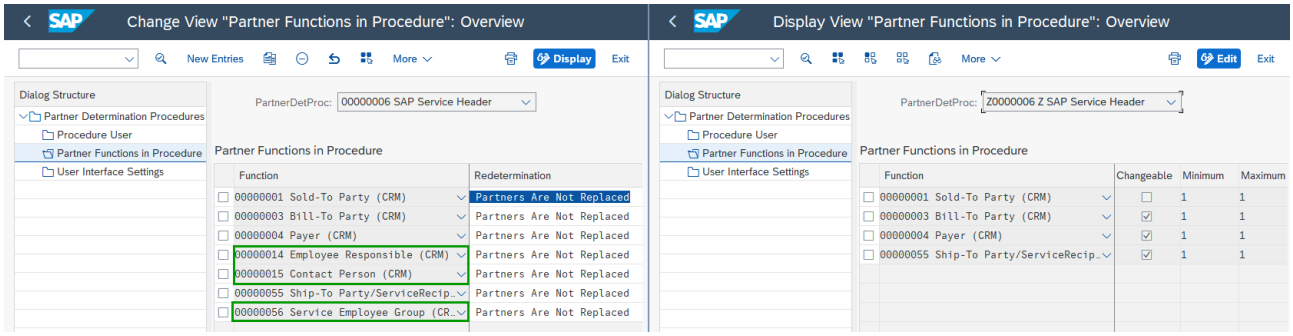


Figure 5 Partner Functions in Procedure Service Header

Go to *User Interface Settings* and delete 00000015 Contact Person (CRM) as *Partner Function 2* and 00000014 Employee Responsible (CRM) *as Partner Function 3*. It is also advisable to fill Partner Function 2-4 with 00000003 Bill-To Party (CRM), 00000004 Payer (CRM) and 00000055 Ship- To Party/ Service Recipient. Therefore, these fields will be displayed and checked during service order creation.

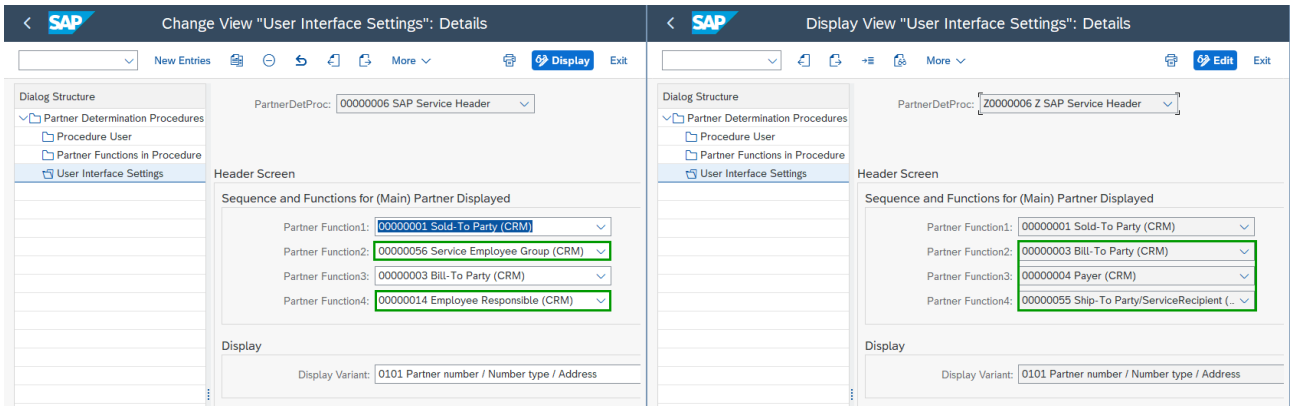


Figure 6 User Interface Settings Service Header

2.3 Service Item

Copy Service Item (00000007) and save for example as Z Service Item (Z0000007).

While copying, go to *Procedure User* and delete BUS2000142 ServMatConfirmItem, BUS2000146 Serv. Material Item, BUS2000158 SrvExpnseConfItem, BUS2000159 Service Expense Item and BUS2000192 Service Maintenance. The business object types affect later explosions directly.

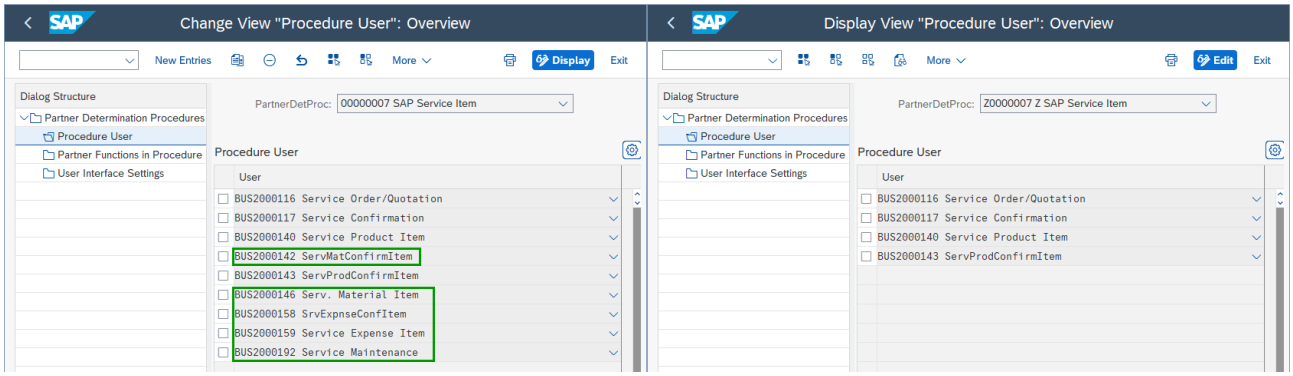


Figure 7 Procedure User Service Item

Go to *Partner Functions in Procedure* and delete Employee Responsible (CRM) (00000014), Exec. Service Employee (CRM) (00000052) and Service Employee Group (CRM) (00000056). These partner functions are not necessarily used within the defined workflow and keep producing errors for the user. A service item can be used without defining an employee responsible, an executive service employee and a service employee group.

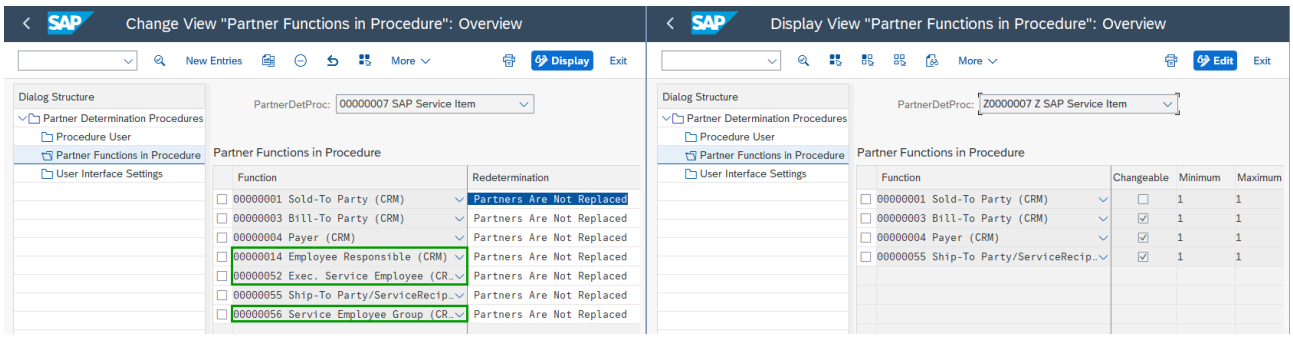


Figure 8 Partner Functions in Procedure Service Item

Go to *User Interface Settings* and change 00000056 Service Employee Group (CRM) to 00000001 Sold- To Party (CRM) as *Partner Function 1*. Therefore, the sold-to party will be displayed and checked during service item usage.

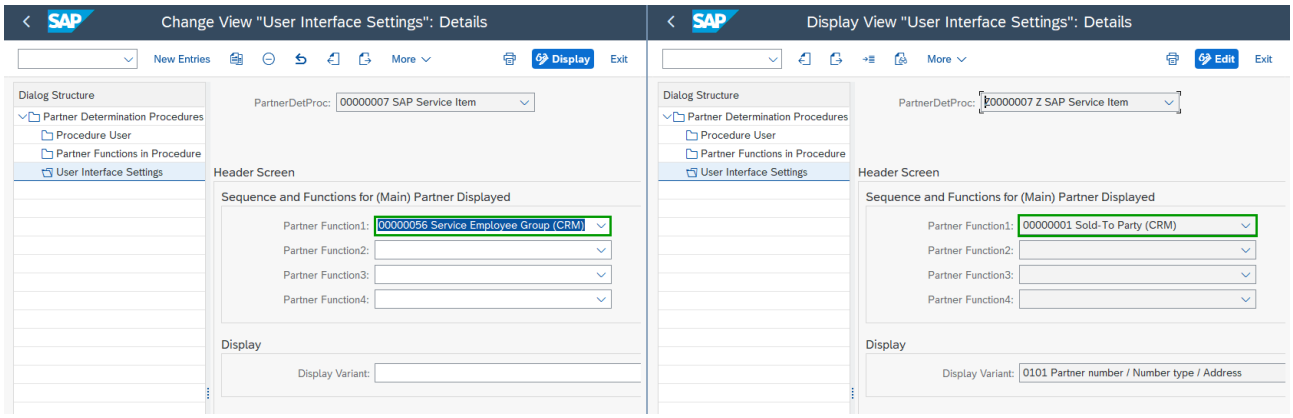


Figure 9 User Interface Settings Service Header

2.4 Service Confirmation

Copy Service Header (00000024) and save for example as Z Service Header (Z0000024).

While copying, go to *Partner Functions in Procedure* and delete Employee Responsible (CRM) (00000014), Contact Person (CRM) (00000015) and Exec. Service Employee (CRM) (00000052). These partner functions are not necessarily used within the defined workflow and keep producing errors for the user. A confirmation can be created without defining an employee responsible, a contact person and an executive service employee.

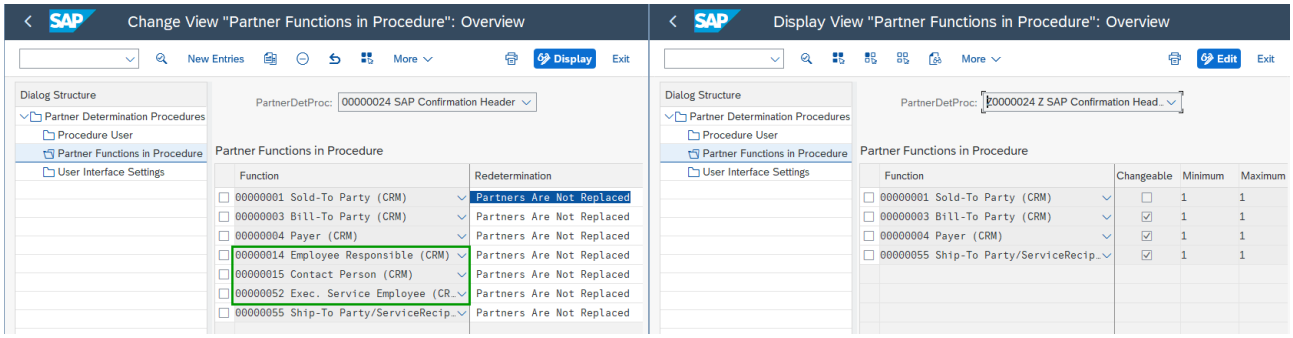


Figure 10 Partner Functions in Procedure Confirmation Header

Go to *User Interface Settings* and change 00000052 Exec. Service Employee (CRM) to 00000003 Bill- To Party (CRM) as *Partner Function 2*. Therefore, the bill-to party will be displayed and checked during confirmation creation.

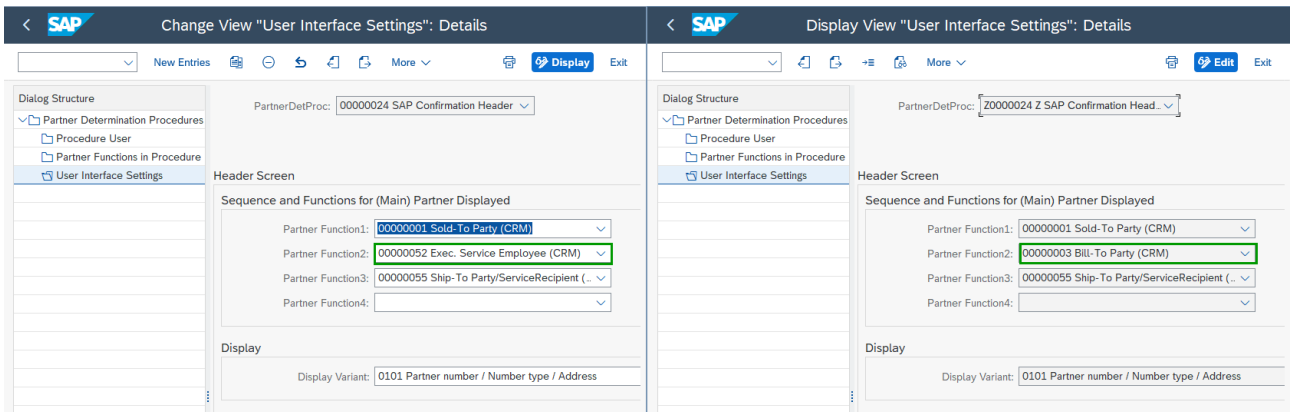


Figure 11 User Interface Settings Confirmation Header

3 Status Management

The current processing status of an object can be documented by using status management. The current object state can consist of a combination of individual statuses. Any number of statuses can be set for an object.

3.1 Define Status Profile for User Status

A status profile can be set for every service transaction type. Therefore, not only the standard *Life Cycle Status* has to be used, but additional individual status sequencies for every document type are possible.

In this scenario, the service order got several individual statuses.

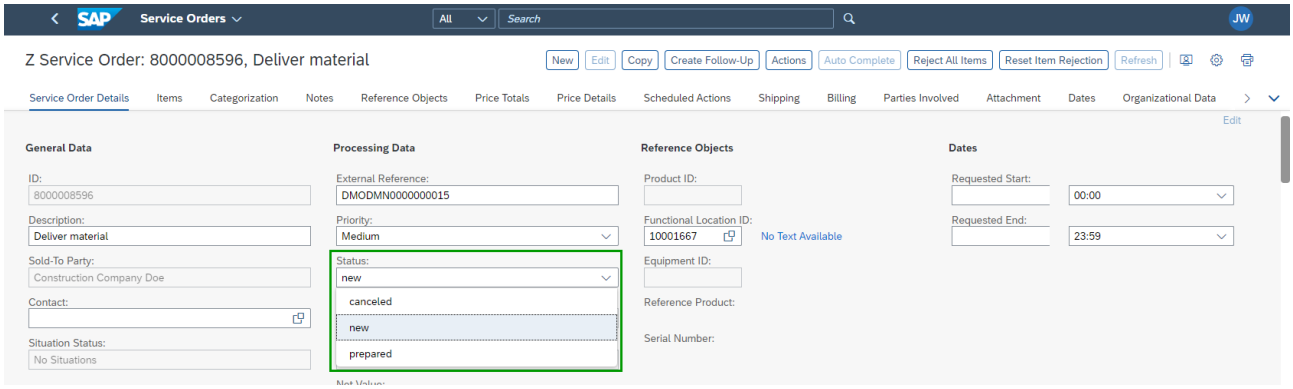


Figure 12 User Status Service Order

To create and edit user statuses go to *Service* > *Transactions* > *Basic Settings* > *Status Management* > *Define Status Profile for User Status*.

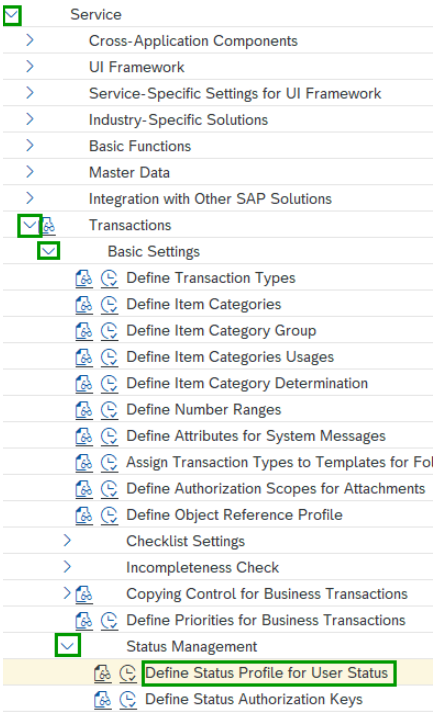
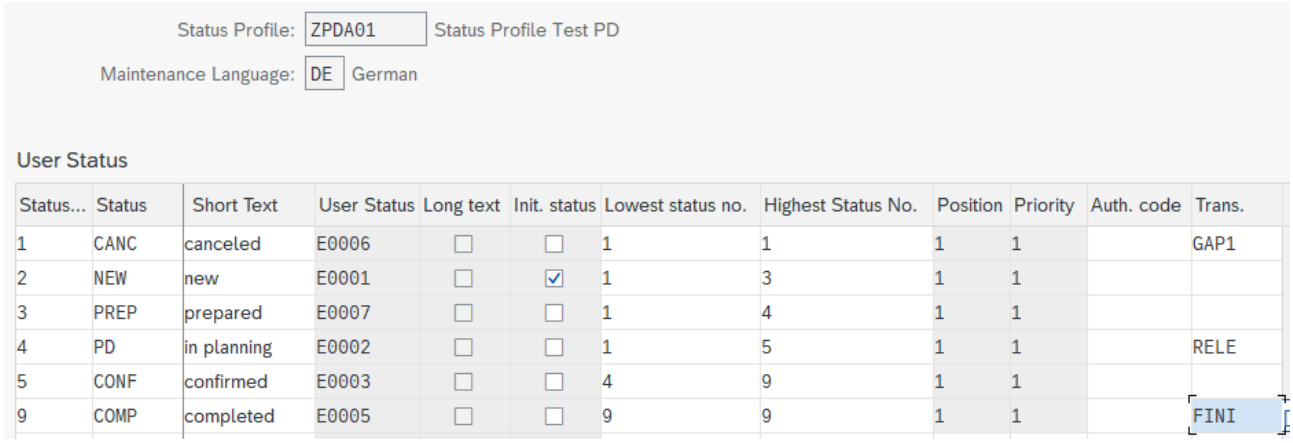


Figure 13 Path to Define Status Profile for User Status

Copy an entry or create a new one. In this scenario, the status profile ZPDA01 (Status Profile Test PDA) was created.

Figure 14 Status Profile Overview

Double click on the entry to see more information. Every status has its own entry with a status sequence. It is also necessary to enter an abbreviation and a short description for every status. Internal user status IDs (E0001 to E0007) are set automatically by the system when the first status change occurs.

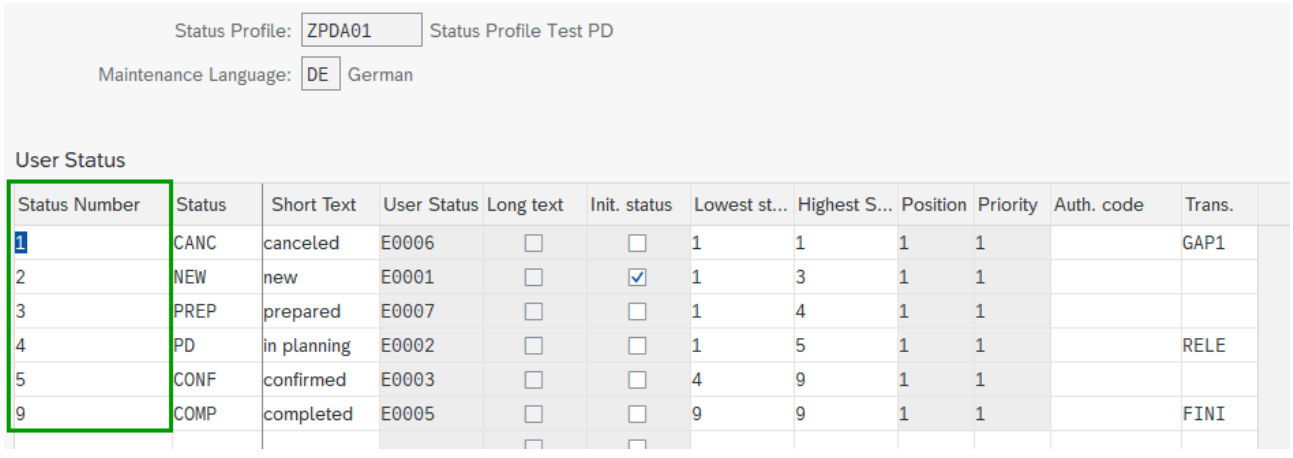


Status...	Status	Short Text	User Status	Long text	Init. status	Lowest status no.	Highest Status No.	Position	Priority	Auth. code	Trans.
1	CANC	canceled	E0006	☐	☐	1	1	1	1		GAP1
2	NEW	new	E0001	☐	☑	1	3	1	1		
3	PREP	prepared	E0007	☐	☐	1	4	1	1		
4	PD	in planning	E0002	☐	☐	1	5	1	1		RELE
5	CONF	confirmed	E0003	☐	☐	4	9	1	1		
9	COMP	completed	E0005	☐	☐	9	9	1	1		FINI

Figure 15 User Status Sequence

Several steps have to be done to ensure a valid process:

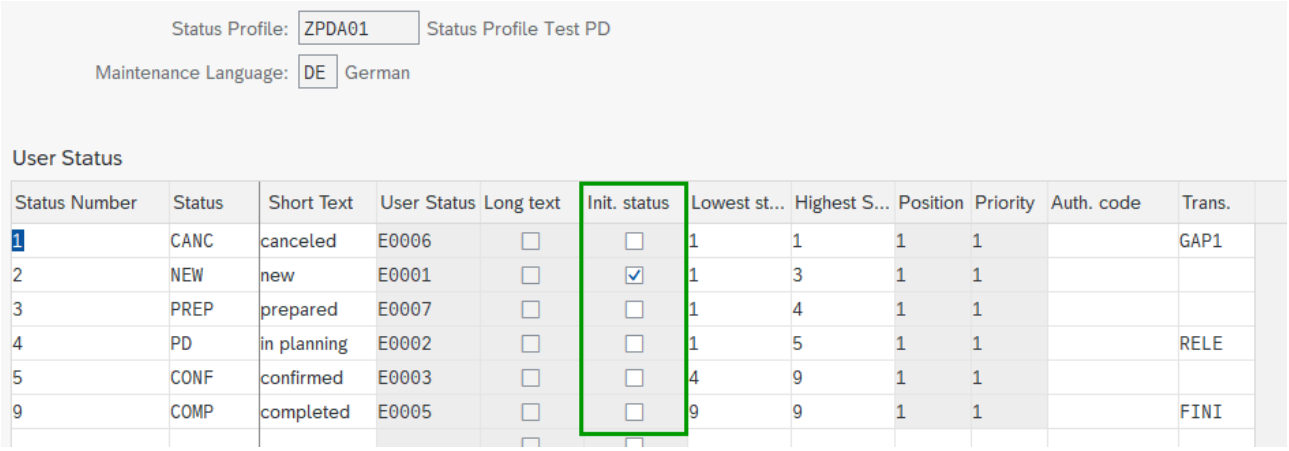
Entries have to get an appropriate numbering. A chronological order is generally useful. The numbering can be edited afterwards if wanted. It is also possible to not give a sequence number to individual entries. One object can have more than one status entry, but only one entry can have a status number.



Status Number	Status	Short Text	User Status	Long text	Init. status	Lowest st...	Highest S...	Position	Priority	Auth. code	Trans.
1	CANC	canceled	E0006	☐	☐	1	1	1	1		GAP1
2	NEW	new	E0001	☐	☑	1	3	1	1		
3	PREP	prepared	E0007	☐	☐	1	4	1	1		
4	PD	in planning	E0002	☐	☐	1	5	1	1		RELE
5	CONF	confirmed	E0003	☐	☐	4	9	1	1		
9	COMP	completed	E0005	☐	☐	9	9	1	1		FINI

Figure 16 Status Number

New objects can have an initial status being set. This can be defined and edited in the column *Init. Status*.



Status Profile: ZPDA01 Status Profile Test PD

Maintenance Language: DE German

User Status

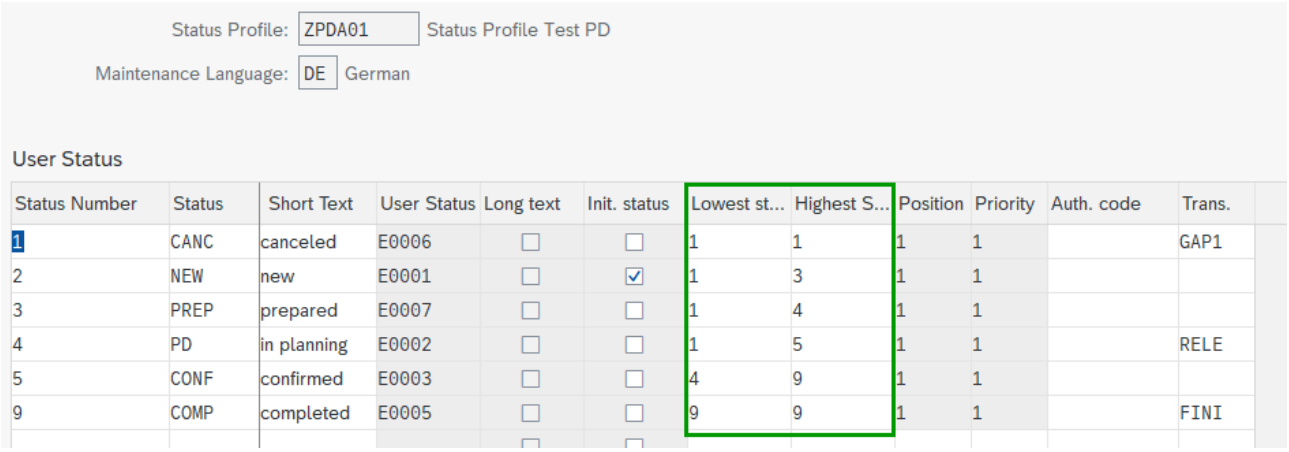
Status Number	Status	Short Text	User Status	Long text	Init. status	Lowest st...	Highest S...	Position	Priority	Auth. code	Trans.
1	CANC	canceled	E0006	☐	☐	1	1	1	1		GAP1
2	NEW	new	E0001	☐	☑	1	3	1	1		
3	PREP	prepared	E0007	☐	☐	1	4	1	1		
4	PD	in planning	E0002	☐	☐	1	5	1	1		RELE
5	CONF	confirmed	E0003	☐	☐	4	9	1	1		
9	COMP	completed	E0005	☐	☐	9	9	1	1		FINI

Figure 17 Initial Status

The old status with its status number is deactivated if another status is used with a status number. Priorities and sequences can be set by using the columns *Lowest Status No.* and *Highest Status No.*.

The active status with status number defines with its highest status number which status will be next considering the status number.

If a status is set, the column lowest status number defines the lowest status numbers of all subsequent statuses. Therefore, the highest used status number of an object is always set. This remains untouched even if it would have been possible to use a status with a lower status number in between. This lower limit is always set and cannot be changed.



Status Profile: ZPDA01 Status Profile Test PD

Maintenance Language: DE German

User Status

Status Number	Status	Short Text	User Status	Long text	Init. status	Lowest st...	Highest S...	Position	Priority	Auth. code	Trans.
1	CANC	canceled	E0006	☐	☐	1	1	1	1		GAP1
2	NEW	new	E0001	☐	☑	1	3	1	1		
3	PREP	prepared	E0007	☐	☐	1	4	1	1		
4	PD	in planning	E0002	☐	☐	1	5	1	1		RELE
5	CONF	confirmed	E0003	☐	☐	4	9	1	1		
9	COMP	completed	E0005	☐	☐	9	9	1	1		FINI

Figure 18 Lowest and Highest Status Number

A business transaction can be assigned to individual status entries if wanted. If this assignment is used, system status changes will be applied as well.

Status Profile: ZPDA01 Status Profile Test PD

Maintenance Language: DE German

User Status

Status Number	Status	Short Text	User Status	Long text	Init. status	Lowest st...	Highest S...	Position	Priority	Auth. code	Trans.
1	CANC	canceled	E0006	☐	☐	1	1	1	1		GAP1
2	NEW	new	E0001	☐	☑	1	3	1	1		
3	PREP	prepared	E0007	☐	☐	1	4	1	1		
4	PD	in planning	E0002	☐	☐	1	5	1	1		RELE
5	CONF	confirmed	E0003	☐	☐	4	9	1	1		
9	COMP	completed	E0005	☐	☐	9	9	1	1		FINI

Figure 19 Business Transactions

There are several predefined processes for using business transactions. The transaction BS33 shows more details such as which kind of object type is allowed, which system status has to be set or which system status values are set or deleted.

In this scenario, go to transaction BS33 and enter *RELE* at the end of the page in the blank field. Press enter and *RELE* is shown at the top of the list. Place the cursor in the field of *RELE* and press the button *Where-used list* or press F6.

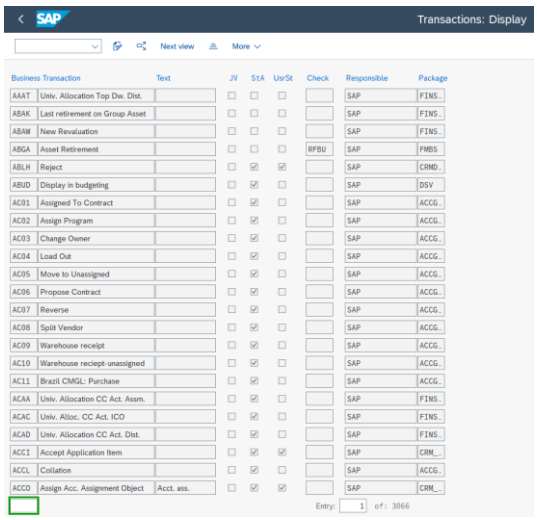


Figure 20 Transaction Display: Start

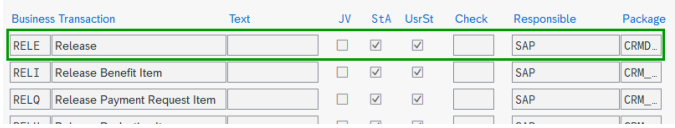


Figure 21 Business Transaction *RELE* (Release)

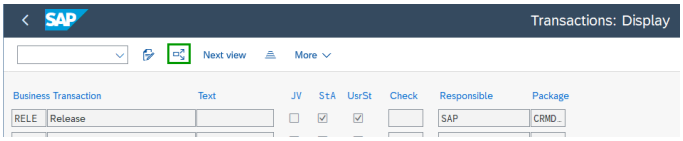


Figure 22 Button Where-used list (F6)

This process is usable for the technical object *CRM Order Header* which includes the service order. The status released is set as a system status and several other system status values are deleted.

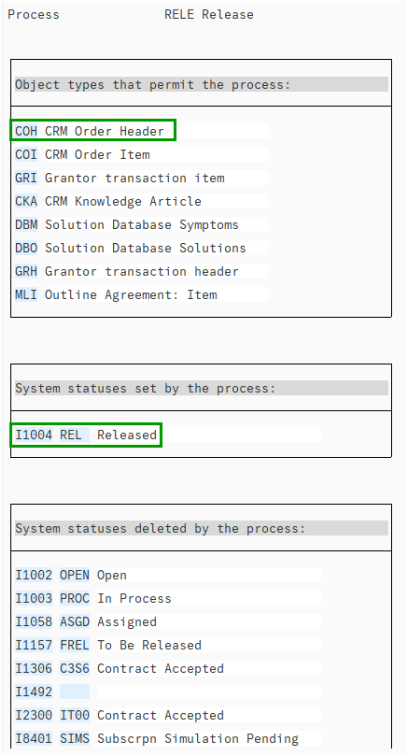


Figure 23 Process Cross-Reference

Be aware: New or edited status sequences are only triggered if new service orders are created.

3.2 Optimize User Status for Queries

User status IDs have to be mapped with the field *STAT_LIFECYCLE*. This is necessary to be able to do status changes within the UI.

To define the status user IDs, go to *Service* > *Transactions* > *Basic Settings* > *Status Management* > *Optimize User Status for Queries*.

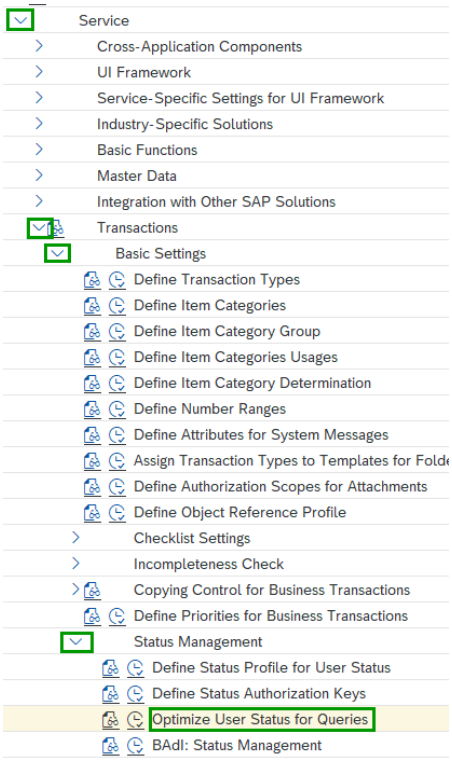


Figure 24 Path to Optimize User Status for Queries

First, define status abbreviations with short descriptions.

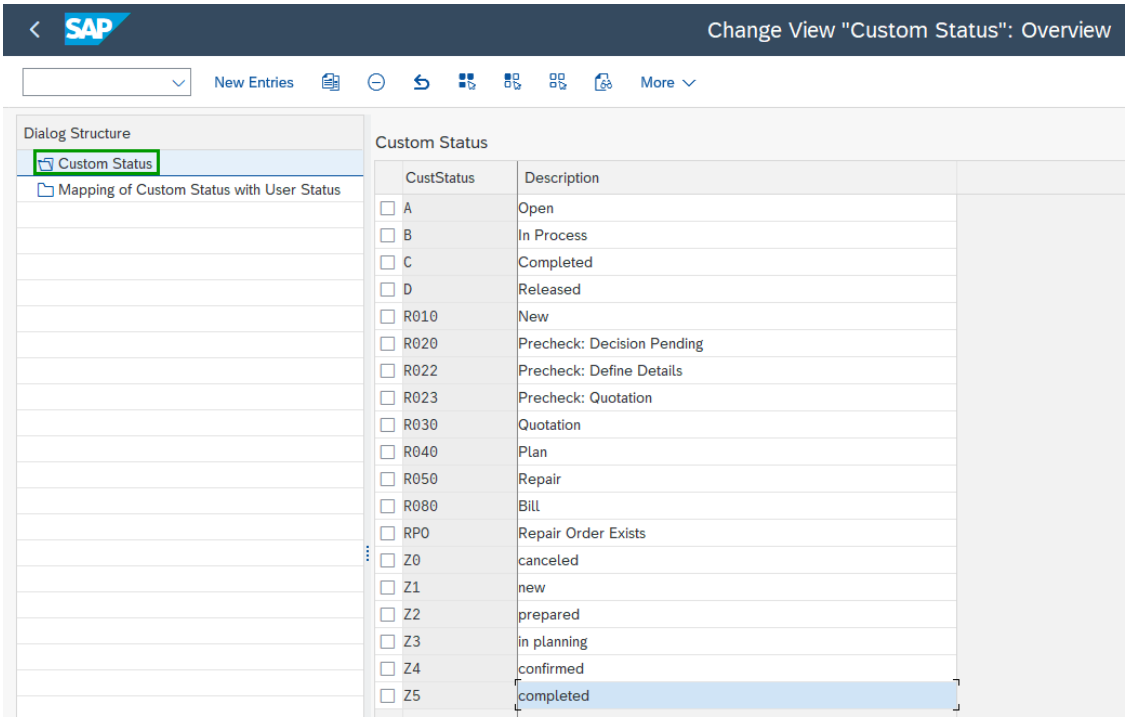
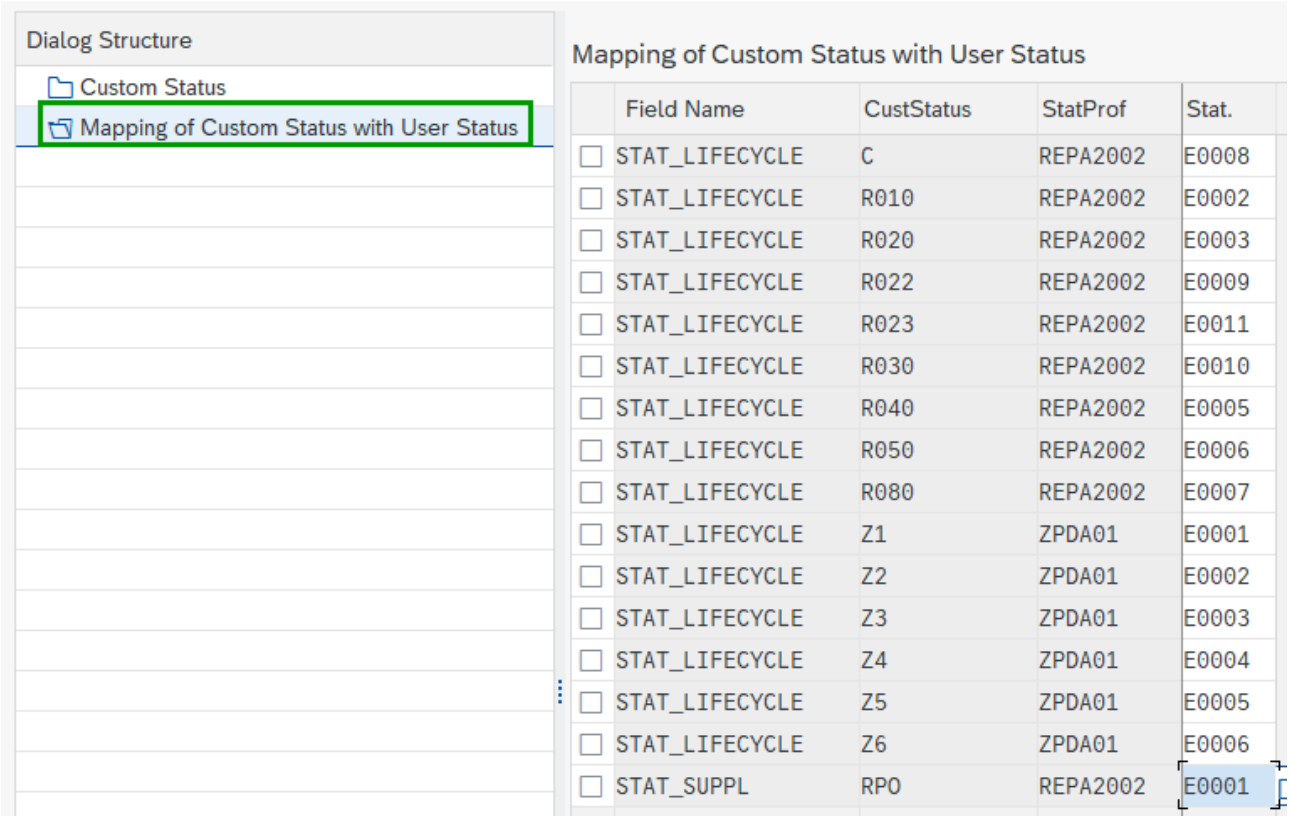


Figure 25 Custom Status

Second, user statuses within the field *STAT_LIFECYCLE* have to be mapped with user status IDs Exxxx.



Field Name	CustStatus	StatProf	Stat.
STAT_LIFECYCLE	C	REPA2002	E0008
STAT_LIFECYCLE	R010	REPA2002	E0002
STAT_LIFECYCLE	R020	REPA2002	E0003
STAT_LIFECYCLE	R022	REPA2002	E0009
STAT_LIFECYCLE	R023	REPA2002	E0011
STAT_LIFECYCLE	R030	REPA2002	E0010
STAT_LIFECYCLE	R040	REPA2002	E0005
STAT_LIFECYCLE	R050	REPA2002	E0006
STAT_LIFECYCLE	R080	REPA2002	E0007
STAT_LIFECYCLE	Z1	ZPDA01	E0001
STAT_LIFECYCLE	Z2	ZPDA01	E0002
STAT_LIFECYCLE	Z3	ZPDA01	E0003
STAT_LIFECYCLE	Z4	ZPDA01	E0004
STAT_LIFECYCLE	Z5	ZPDA01	E0005
STAT_LIFECYCLE	Z6	ZPDA01	E0006
STAT_SUPPL	RPO	REPA2002	E0001

Figure 26 Mapping of Custom Status with User Status

Go to grid *CRMS4D_SERV_H* and check the field *STAT_LIFECYCLE*. For every new service order, the entry Z1 (as defined in customizing) should be filled in.

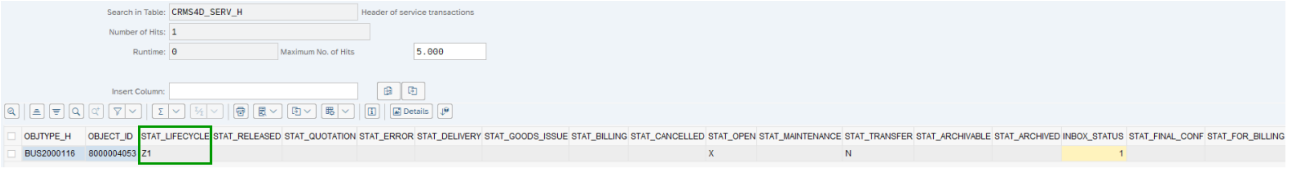


Figure 27 Header of Service Transactions

4 Define Transaction Types

Transaction types define the characteristics and attributes of a business transaction and determine how the transaction is processed. A transaction type is assigned to one or more business transaction categories. Only specific combinations of business transaction categories are allowed. Furthermore, there is one business transaction category defined as the leading category. Also, a default item category is specified for a transaction type.

To define the behavior of service contracts, service orders and service confirmations go to *SPRO* > *Service* > *Transactions* > *Basic Settings* > *Define Transaction Types*.

The transaction types should be copied and changed as described below.

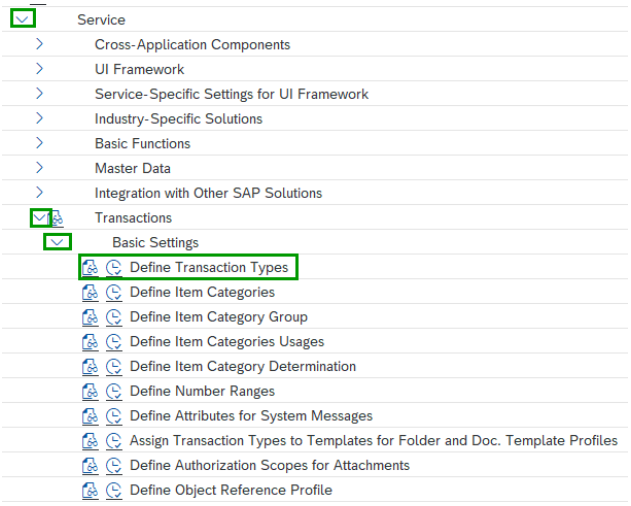


Figure 28 Path to "Define Transaction Types"

4.1 Service Contract

Copy the transaction type SC (Service Contract) and change it to ZSC (Z Service Contract). Make sure to keep the Leading Transaction Category setting BUS2000112 (Service Contract). Change the Partner Determination Procedere to Z0000041 (Z Service Contract (Header)) and keep all remaining settings.

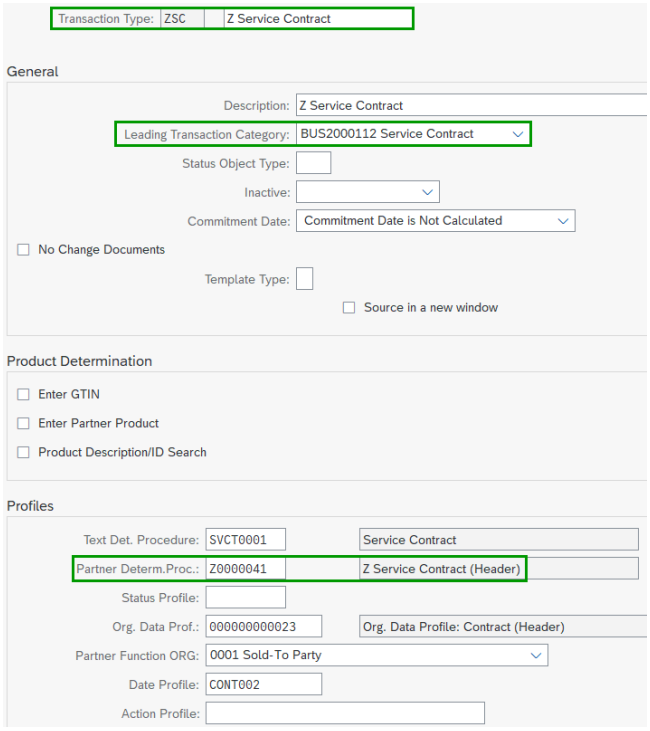


Figure 29 Transaction Type Copy Service Contract

Make sure to keep the following Business Transactions Categories for ZSVO:

- BUS2000112 Service Contract
- BUS2000115 Sales
- BUS2000116 Service Order/ Quot.

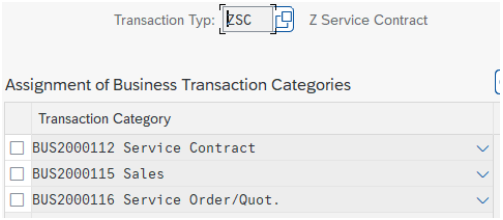


Figure 30 Assigned Business Transactions Categories for ZSC

4.2 Service Header

Copy the transaction type SRVO (Service Order) and change it to ZSVO (Z Service Order). Make sure to keep the Leading Transaction Category setting BUS2000116 (Service Order/ Quot.). Change Partner Determination Procedere to Z0000006 (Z SAP Service Header), Status Profile to ZPDA01 and Organizational Data Profile to Z00000000001 (Z SAP Service Header).

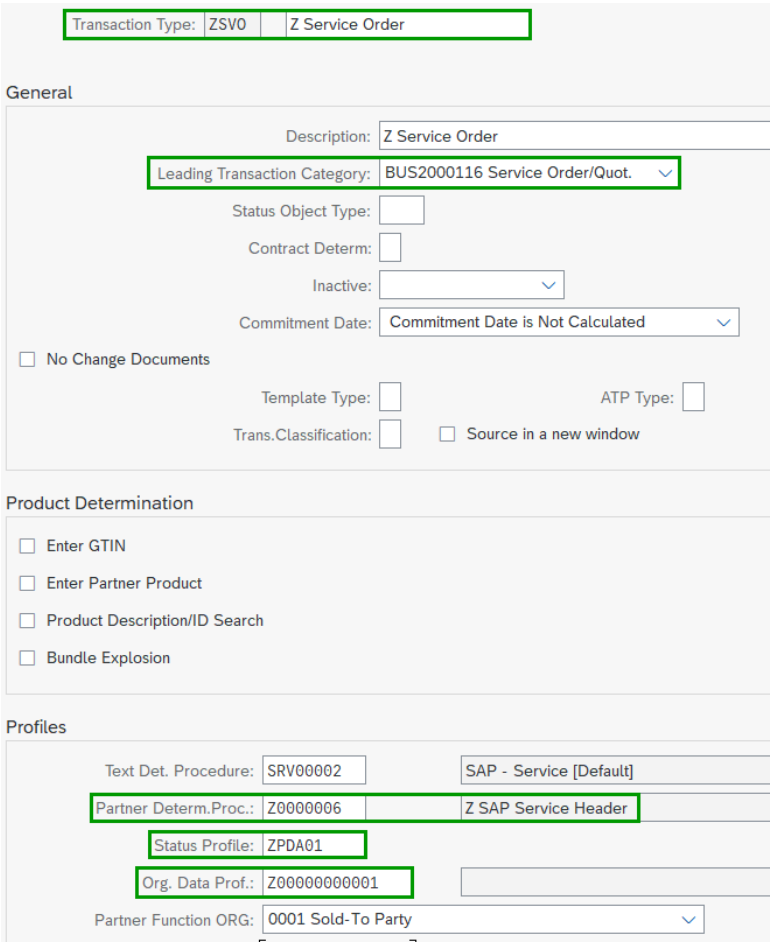


Figure 31 Transaction Type Copy Service Order

Make sure to keep the following Business Transactions Categories for ZSVO:

- BUS2000115 Sales
- BUS2000116 Service Order/ Quot.
- BUS2000126 Business Activity

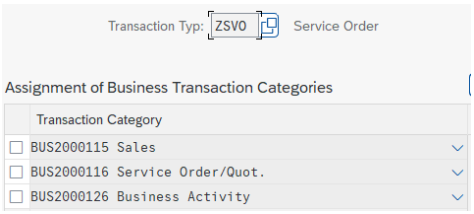


Figure 32 Assigned Business Transactions Categories for ZSVO

4.3 Service Confirmation

Copy the transaction type SRVC (Confirmation) and change it to ZSVC (Z Confirmation). Make sure to keep the Leading Transaction Category setting Service Confirmation (BUS2000117). Change the Partner Determination Procedere to Z0000024 (Z SAP Confirmation Header) and keep all remaining settings.

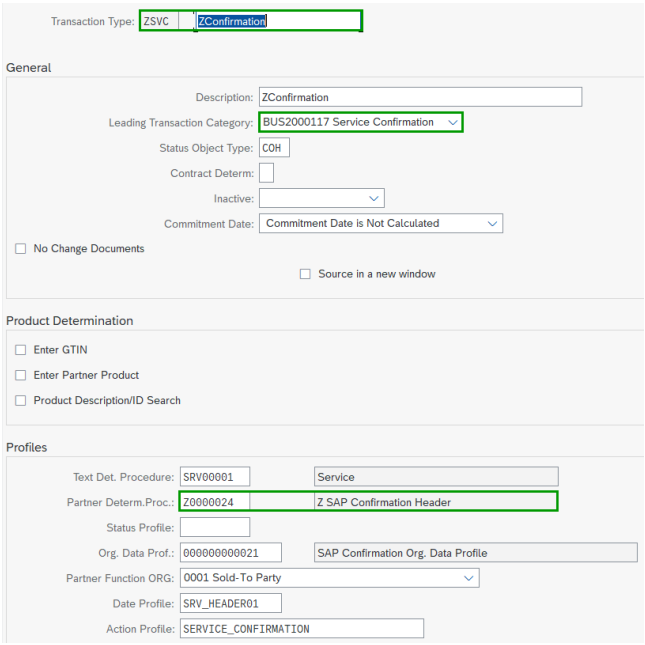


Figure 33 Transaction Type Copy Service Confirmation

Make sure to keep the following Business Transactions Categories for ZSVC:

- BUS2000115 Sales
- BUS2000116 Service Order/ Quot.
- BUS2000126 Business Activity

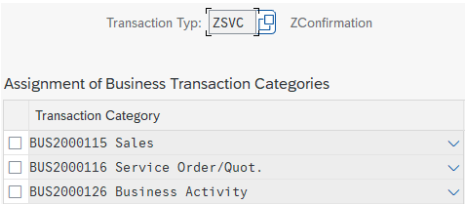


Figure 34 Assigned Business Transactions Categories for ZSVC

5 Define Item Categories

Item categories define the characteristics and attributes of a transaction item and determine how the item is processed.

There can be hierarchies of templates by assigning templates to items in other templates. Since the templates on a hierarchy are only linked by means of reference, there are only changes needed to templates once and they are automatically available wherever referenced in the hierarchy.

To define the behavior of items, go to *SPRO* > *Service* > *Transactions* > *Basic Settings* > *Define Item Categories*.

The item categories should be copied and changed as described below.

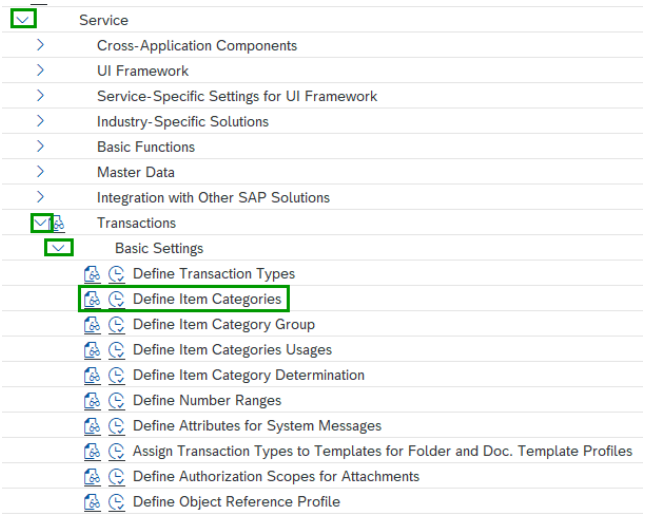


Figure 35 Path to "Define Item Categories"

5.1 Service Item

Copy the item category SRVP (Service Item) and change it to ZRVP (Z Service Product Item). Make sure to keep the Object Type BUS2000140 (Service Product Item). Change the Partner Determination Procedure to Z0000007 (Z SAP Service Item) and keep all remaining settings.

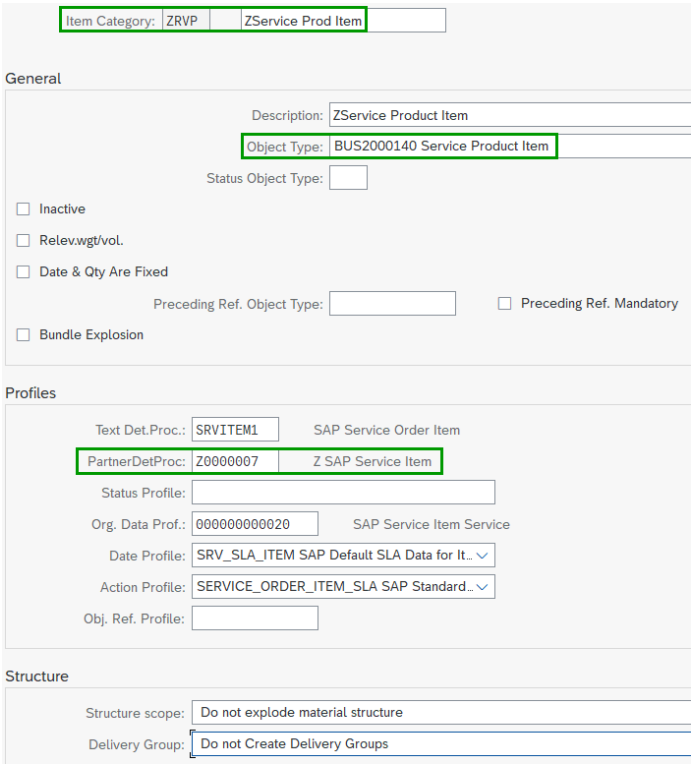


Figure 36 Item Category Copy Service Item

Make sure to keep the following Business Transactions Categories for ZRVP:

- BUS2000115 Sales
- BUS2000116 Service Order/ Quot.

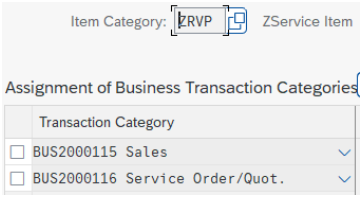


Figure 37 Assigned Business Transactions Categories for ZRVP

5.2 Service Product

Copy the item category SVCP (Service Product) and change it to ZVCP (Z Service Product Confirmation Item). Make sure to keep the Object Type BUS2000143 (Service Product Confirmation Item). Change the Partner Determination Procedure to Z0000007 (Z SAP Service Item) and keep all remaining settings.

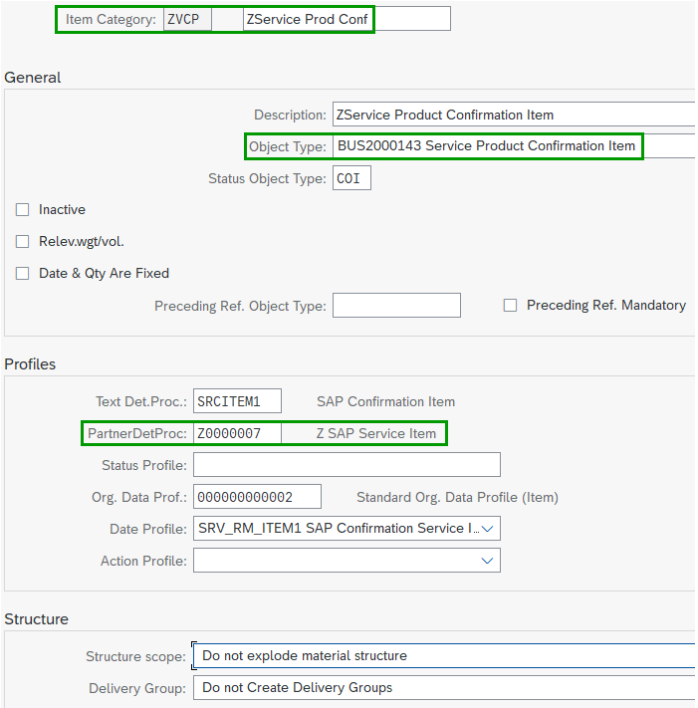


Figure 38 Item Category Copy Service Product

Make sure to keep the following Business Transactions Categories for ZRVP:

- BUS2000115 Sales
- BUS2000116 Service Order/ Quot.

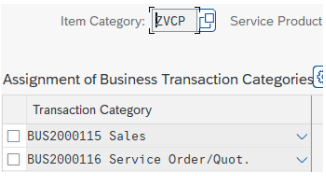


Figure 39 Assigned Business Transactions Categories for ZVCP

The checkbox "Relevance to Costs" was unmarked within the business transaction BUS 2000116 in the item category confirmation (ZVCP). This change is made to control whether information that has been confirmed, such as times and materials, should be distributed to other systems.

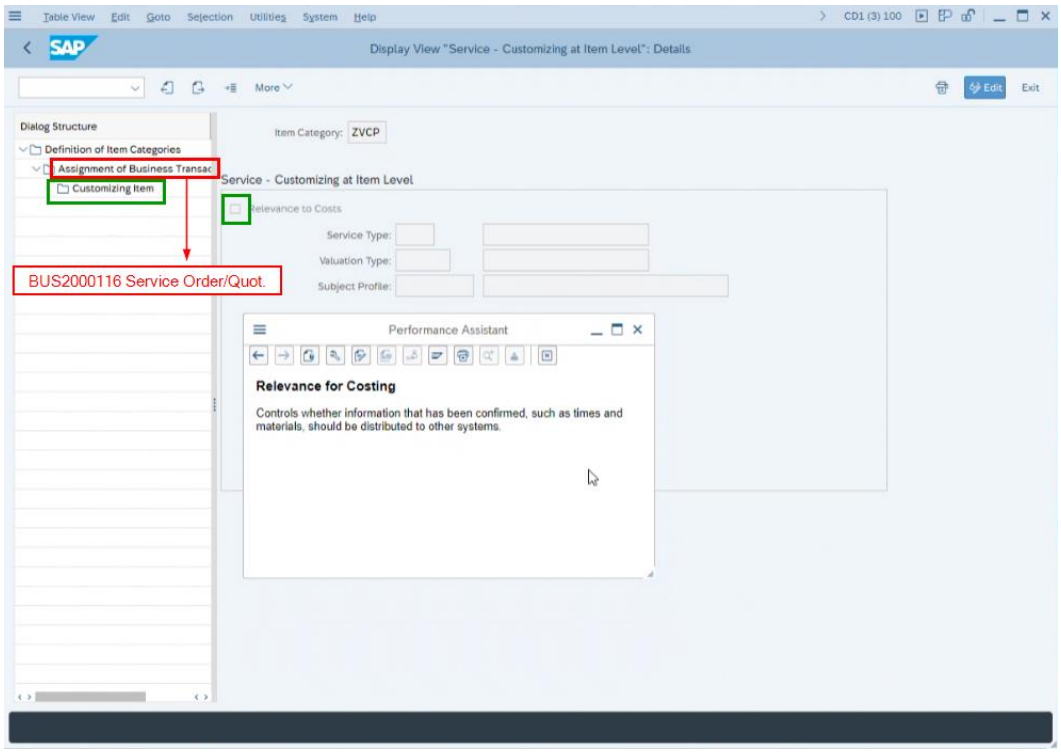


Figure 40 Changes "Relevance to Costs" in ZVCP BUS2000116

5.3 Service Contract Items

Service contract items are elements of the service contract. They define the service or product which are provided to the customer under the terms of the service contract. A service contract item can be a service, a material, time, response time or warranty. The items in a service contract are controlled by item categories. It is possible for a service contract to include items with different item categories.

There are several service contract item categories to choose from. In this scenario all possible contract item categories are copied without any changes. All items have the item object type Service Contract Item (BUS2000137).

Definition of Item Categories

Item Cat.	Description	Description	Inactive	Item Object Type	Ind. Obj.	TextDet.Proc.	Tex
ZCNA	SC Itm (Pri. Adptn.)	ZService Contract Item(Price Adaptation)		BUS2000137 Service Contract Item		SVCTITM1	Ser
ZCNB	SC Itm (Ad-hoc Bill)	ZService Contract Item (Ad-hoc Billing)		BUS2000137 Service Contract Item		SVCTITM1	Ser
ZCNC	Value/Qty Contract	ZValue/Quantity Contract		BUS2000137 Service Contract Item		SVCTITM1	Ser
ZCNP	Service Contract Itm	ZService Contract Item (Quotation)		BUS2000137 Service Contract Item		ORDER001	Sale
ZRVP	ZService Prod Item	ZService Product Item		BUS2000140 Service Product Item		SRVITEM1	SAP
ZSCN	Service Contract	ZService Contract		BUS2000137 Service Contract Item		SVCTITM1	Ser
ZVCP	ZService Prod Conf	ZService Product Confirmation Item		BUS2000143 Service Product Confirma…		SRCITEM1	P

Figure 41 Item Category Copy Service Contract and Service Contract Items

The pricing data of the service contract item (ZSCN) has to be changed within the business transaction category BUS2000115 (Sales) if the service contract items are supposed to be cumulated in the header totals. Therefore go into the item category, go to the assigned business transaction categories and mark BUS2000115 (Sales). Click on "Customizing Item" and change the "Statist. Value" to "System will copy item to header totals".

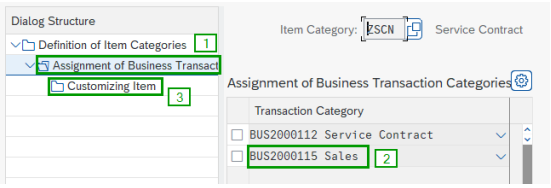


Figure 42 Path to "Pricing Data" within ZSCN

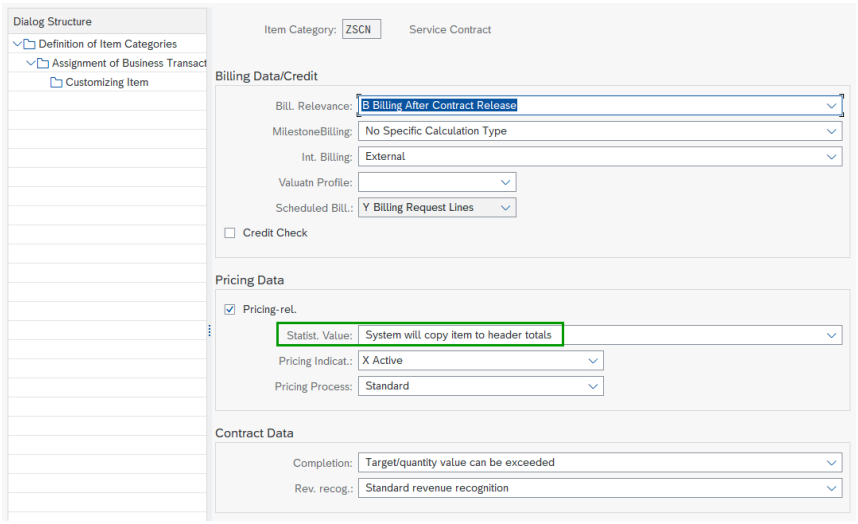


Figure 43 Pricing Data of ZSCN within BUS2000115 (Sales)

6 Define Item Category Determination

This setting defines which item category group is defined automatically when an item is entered.

To define the determination of item categories, go to *SPRO* > *Service* > *Transactions* > *Basic Settings* > *Define Item Category Determination*.

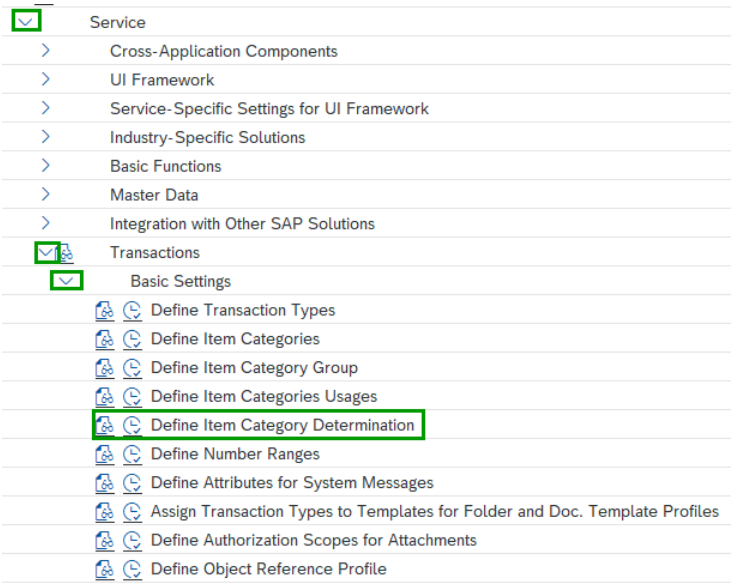


Figure 44 Path to "Define Item Category Determination"

6.1 Service Contract

The transaction type Service Contract is matched with the item category group SRVP Service Product. If a material/product which has the item category group SRVP Service Product is used as an item within a service contract the item category ZSCN (Service Contract) will be shown automatically. The user can change the item category manually to:

- Value/ Quantity Contract (ZCNC)
- Service Contract Item (Price Adoption) (ZCNA)
- Service Contract Item (Ad-hoc Bill) (ZCNB)

Figure 45 Item Category Determination for service contract

6.2 Service Order

There are several cases for service orders possible.

1) If a material/product which has the item category group 0002 Configuration is used as an item within a service contract the item category TAC (Config.at Mat.Level) will be shown automatically.
2) If a material/product which has the item category group SRVP Service Product is used as an item within a service contract the item category ZRVP (Z Service Product Item) will be shown automatically. The user can change the item category manually to Service Item (SRVP).
3) If a material/product which has no item category group is used as an item within a service contract the item category ZRVP (Z Service Product Item) will be shown automatically. The user can change the item category manually to Service Item (SRVP).

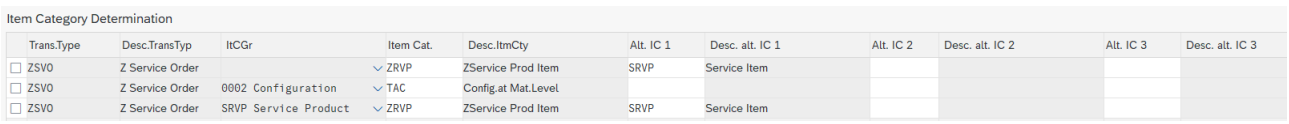
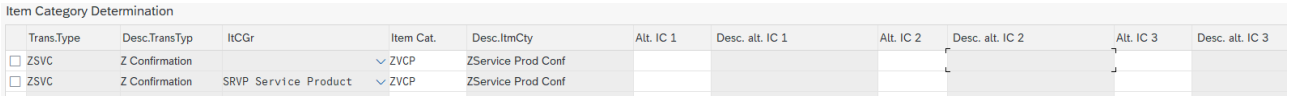


Figure 46 Item Category Determination for service order

6.3 Service Confirmation

There are several cases for service orders possible.

1) If a material/product which has the item category group SRVP Service Product is used as an item within a service contract the item category SRVP (Service Item) will be shown automatically.
2) If a material/product which has no item category group is used as an item within a service contract the item category SRVP (Service Item) will be shown automatically.


Item Category Determination

Trans.Type	Desc.TransTyp	ItCGr	Item Cat.	Desc.ItmCty	Alt. IC 1	Desc. alt. IC 1	Alt. IC 2	Desc. alt. IC 2	Alt. IC 3	Desc. alt. IC 3
ZSVC	Z Confirmation		ZVCP	ZService Prod Conf						
ZSVC	Z Confirmation	SRVP Service Product	ZVCP	ZService Prod Conf						

Figure 47 Item Category Determination for service confirmation

7 Service Transactions: Copying Control for Business Transactions

7.1 Define Copying Control for Transaction Types

A copying control is defined for transaction types by assigning a template to an item. If a follow-up transaction is triggered the template reference is copied to the new item or items from the template are automatically copied as subitems of the follow-up item.

To define the copy control, go to *SPRO* > *Service* > *Transactions* > *Basic Settings* > *Copying Control for Transaction Types.*

Which data is copied into another transaction as default is controlled within the customizing for the copy control.

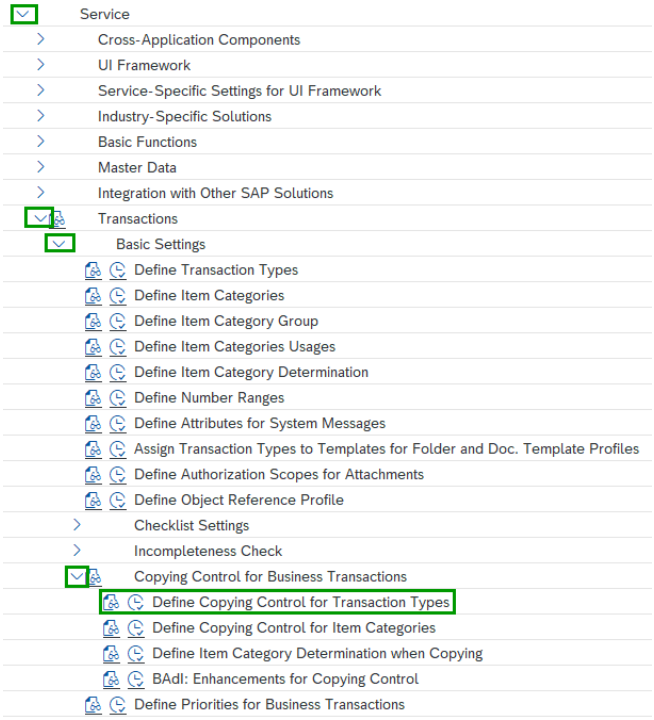


Figure 48 Path to "Define Copying Control for Transaction Types"

The following settings were made to:

- Copy service contract data into the service order
- Copy service order data into the service order
- Copy service order data into the service confirmation

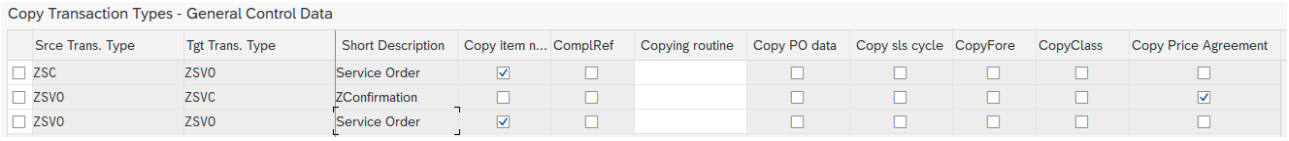


Figure 49 Copy Transaction Types – General Control Data

If a service order is triggered directly from a service contract, item numbers will be copied into the service order. Therefore, the copy control of Service Contract (SC) to Service Order (SRVO) was copied without any changes and defined as Z Service Contract (ZSC) to Z Service Order (ZSVO).

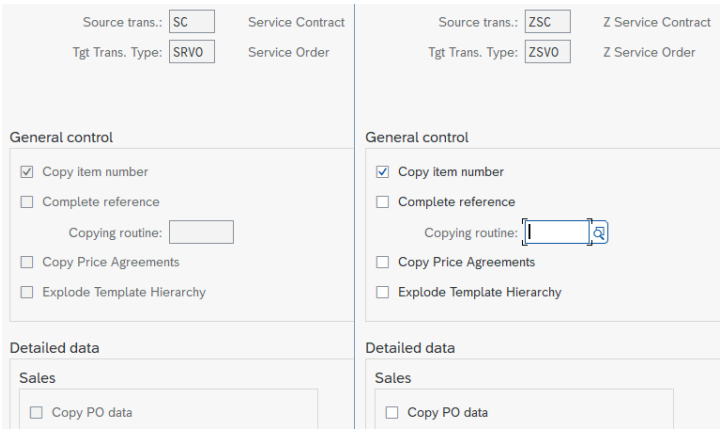


Figure 50 Copy Control Service Contract to Service Order

If a service order is created with reference to another service order, item numbers will be copied into the target service order. Therefore, the copy control of Service Order (SRVO) to Service Order (SRVO) was copied without any changes and defined as Z Service Order (ZSVO) to Z Service Order (ZSVO).

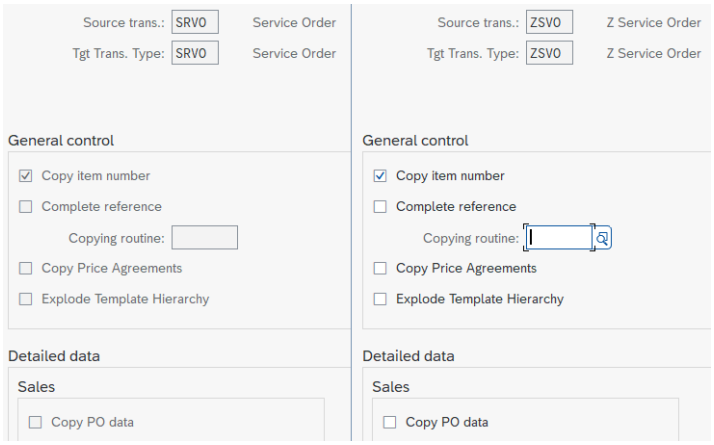


Figure 51 Copy Control Service Order to Service Order

If a service confirmation is triggered directly from a service order, item numbers will be copied into the service confirmation. Therefore, the copy control of Service Order (SRVO) to Service Confirmation (SRVC) was copied without any changes and defined as Z Service Order (ZSVO) to Z Confirmation (ZSVC).

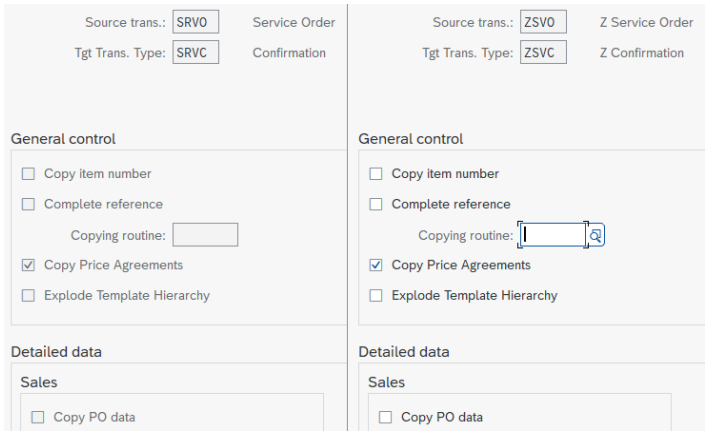


Figure 52 Copy Control Service Order to Service Confirmation

7.2 Define Copying Control for Item Categories

Item categories define the characteristics and attributes of a transaction item and determine how the item is processed.

If a template to an item is assigned to an item and a follow-up transaction is created one of the following occurs:

- The item reference is copied to the new item.
- Items from the template are automatically copied as subitems of the follow-up item.

To define copying control for item categories, go to *Service* > *Transactions* > *Basic Settings* > *Copying Control for Business Transactions* > *Define Copying Control for Item Categories*.

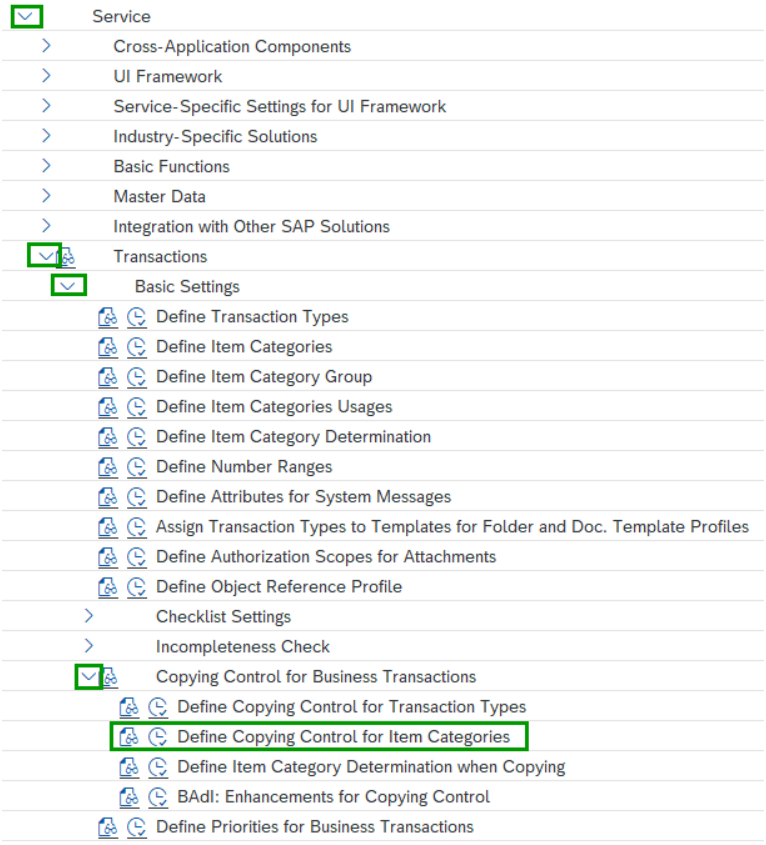
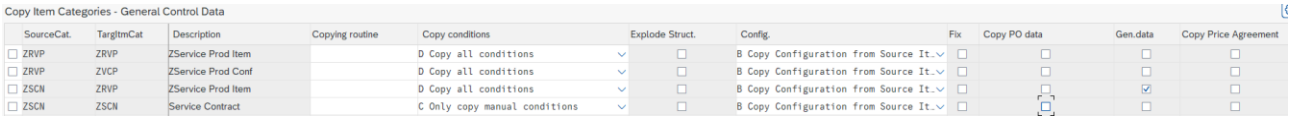


Figure 53 Path to "Define Copying Control for Item Categories"

Copying controls for service contracts, service items and service confirmations are defined.


Copy Item Categories - General Control Data

SourceCat.	TargItmCat	Description	Copying routine	Copy conditions	Explode Struct.	Config.	Fix	Copy PO data	Gen.data	Copy Price Agreement
ZRVP	ZRVP	ZService Prod Item		D Copy all conditions		B Copy Configuration from Source It…				
ZRVP	ZVCP	ZService Prod Conf		D Copy all conditions		B Copy Configuration from Source It…				
ZSCN	ZRVP	ZService Prod Item		D Copy all conditions		B Copy Configuration from Source It…			☑	
ZSCN	ZSCN	Service Contract		C Only copy manual conditions		B Copy Configuration from Source It…				

Figure 54 Copy Item Categories – General Control Data

Got to SCN to SCN Service Contract and copy this entry without any changes as ZSCN to ZSCN Service Contract.

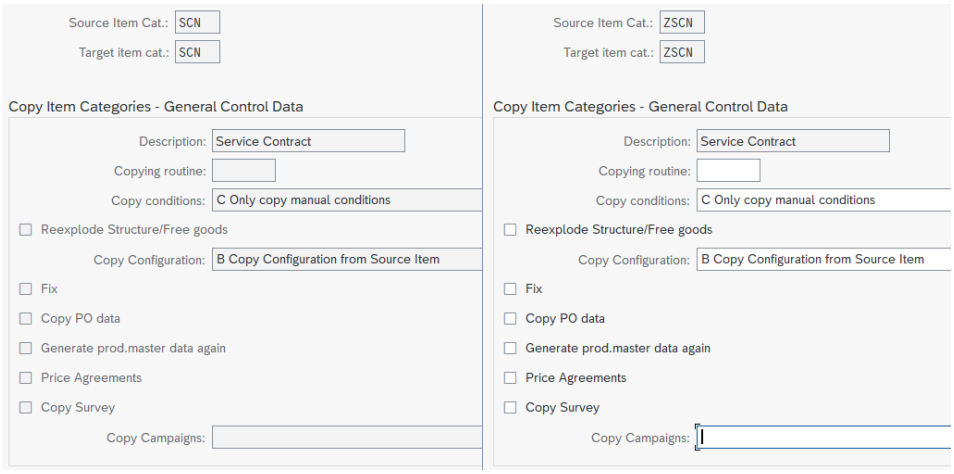


Figure 55 Copy Control Service Contract

Go to SCN Service Contract to SRVP Service Item and copy this entry. While copying change the copy configuration to *B Copy Configuration from Source Item*.

If a service order is triggered from a service contract, the items of the contract will be copied to the service order as service order items. The user can choose whether to copy all or some or none of the items.

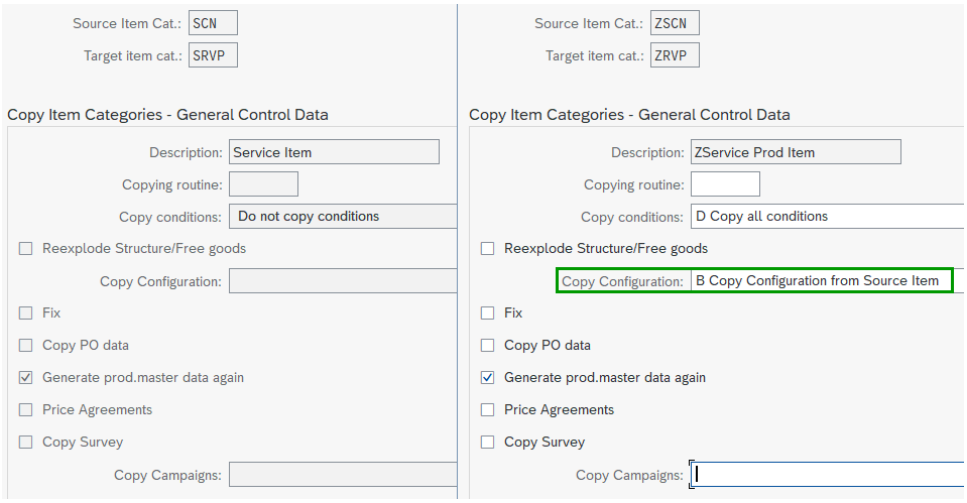


Figure 56 Copy Control Service Contract to Service Item

Go to SRVP Service Item to SRVP Service Item and copy as ZRVP Z Service Product Item to ZRVP Z Service Product Item. While copying change copy configuration to *B Copy Configuration from Source Item*.

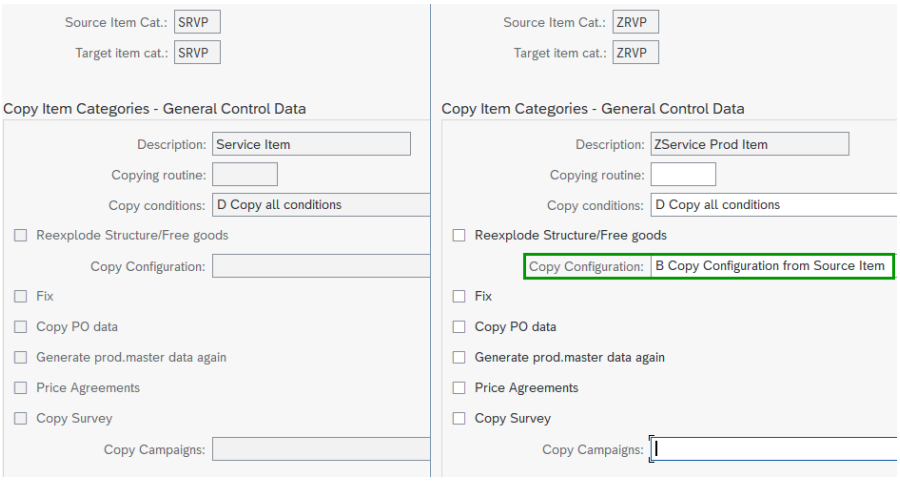


Figure 57 Copy Control Service Item

Go to SRVP Service Product to SVCP Confirmation and copy entry as ZRVP Z Service Product Item to ZVCP Z Service Product Confirmation. While copying change the setting copy configuration to *B Copy Configuration from Source Item*.

If a service confirmation is triggered from a service order, the items of the order will be copied to the confirmation as confirmation items. The user can choose whether to copy all or some or none of the items.

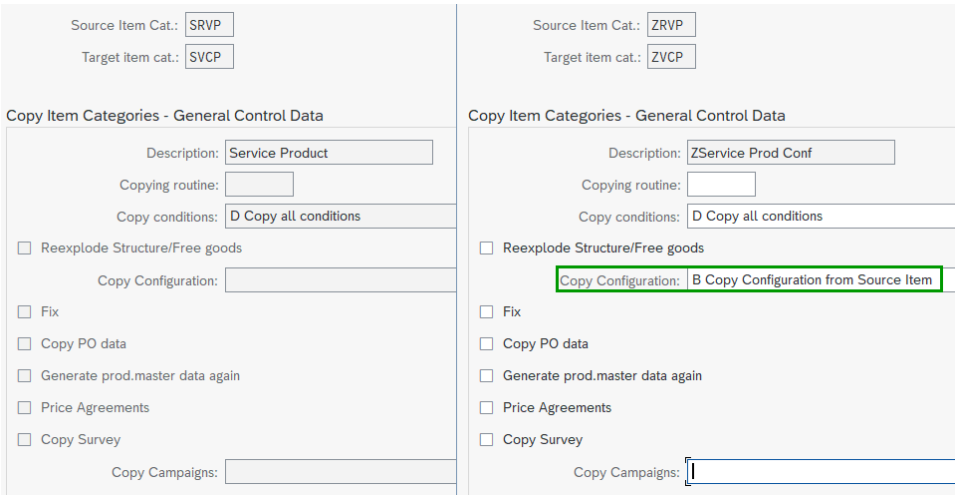


Figure 58 Copy Control Service Product to Service Confirmation

7.3 Define Item Category Determination when Copying

These settings define which item categories are automatically used and available for items within specific transaction.

To define item category determination when copying, go to *Service* > *Transactions* > *Basic Settings* > *Copying Control for Business Transactions* > *Define Item Category Determination when Copying*.

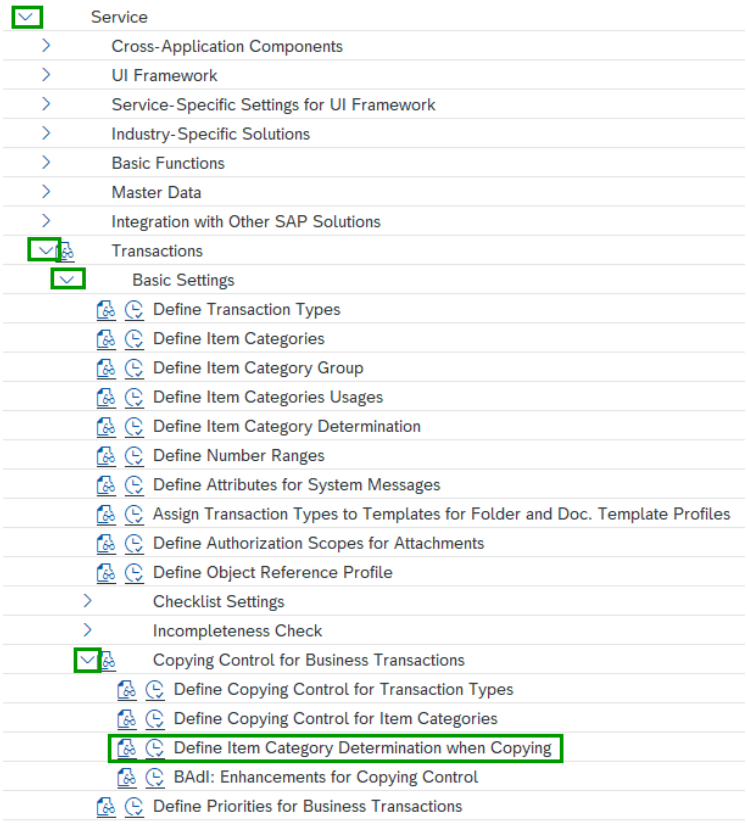


Figure 59 Path to "Define Item Category Determination when Copying"

The following entries are copied and changed as described to fit the needs.

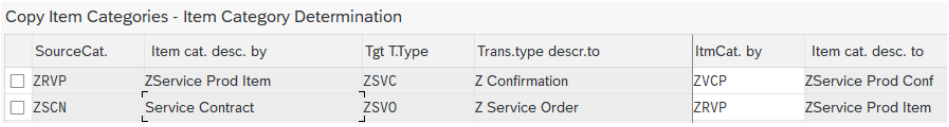


Figure 60 Copy Item Categories – Determination

Go to SCN Service Contract to SRVP Solution Quotation and copy entry as ZSCN Service Contract to ZSVO Z Service Order. While copying change the setting of the target item category to ZRVP Z Service Product Item.

If a service order is created from a service contract, the item categories which are defined in ZRVP are picked automatically for the service item. Only the item categories which are defined in ZRVP can be used.

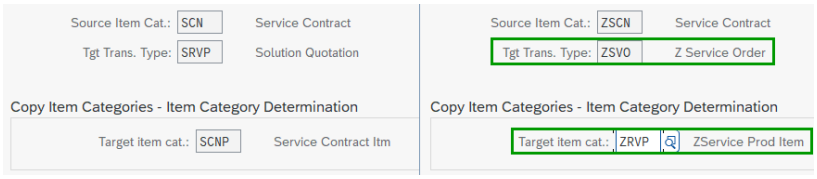


Figure 61 Item Determination Service Contract to Service Order

Go to SRVP Service Item to SRVC Confirmation and copy entry as ZRVP Service Product Item to ZSVC Z Confirmation. While copying change the setting of the target item category to ZVCP Z Service Product Confirmation.

If a service confirmation is created from a service order, the item categories which are defined in ZVCP are picked automatically for the confirmation item. Only the item categories which are defined in ZRVP can be used.

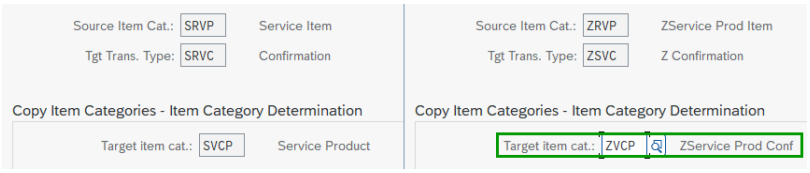


Figure 62 Item Determination Service Item to Service Confirmation

8 Organizational Management

There are organizational units that are relevant for sales and service-related processes while working with SAP S/4 HANA Service.

An organizational unit is described as an organizational object, which is used to form the basis of an organizational model. Organizational units are functional units of a company.

Organizational Management has many options for linking organizational units:

- The organizational units are not already specified: they can have individual organizational levels and leave levels out.
- Organizational units defined in SAP S/4HANA can be assigned as attributes to the organizational units in SAP S/4HANA Service. These attributes are not mandatory for planning the organizational model. However, they are required for automatically determining organizational data in transactions.
- An organization can be activated to be used for several scenarios (enabling it to be a sales organization and service organization at the same time)
- The organizational model is time-dependent- This enables the planning of organizational changes in the future.
- Organizational units can occur as business partners. The system automatically creates a business partner record for an organizational unit with the organizational unit role.

8.1 Organizational Data Determination Rules

When processing a business transaction, certain organizational data is mandatory depending on the transaction type. In the service order the service organization that is responsible for processing is a determining factor.

In SAP S/4HANA Service there are several options for determining organizational data in the transaction. They can be set in the Customizing depending on the transaction type:

- No determination (Entering the organizational data manually)
- Automatic determination (The system determines organizational data using the data available in the transaction or using the user assignments for the organizational unit.)

There are two determination paths provided in SAP S/4HANA Service that have been characterized for the two rule types:

- Rule type Responsibilities (not explained in this guide)
- Rule type Organizational Model

8.1.1 Change of Rule Resolution Using Organizational Model

Rule resolution using organizational model is common if an organizational model is created or if a plan to SAP S/4HANA Service has been distributed and should be also used for determining organizational data. Rule resolution is also used if a large number of attributes are supposed to be assigned to the organizational units and these must be evaluated. For more information (such as prerequisites and process flow) see https://help.sap.com/docs/SAP_S4HANA_ON-PREMISE/b90203d3616f482ebd9776775ac722d8/4655e0e74d976a86e10000000a155369.html?locale=en-US

Several organizational units were created in this scenario. The units *Test* and *Verkaufsorganisation ZSA1* are duplicates. Every time a sales organization is used within the service process flow the system tries to fill it automatically. In this case there is more than one option, therefore the user is asked every time to pick the wanted sales organization. In this scenario only one sales organization was relevant to be picked.

Therefore, open the Fiori Launchpad and open the app *Search Organizations*. Filter organizational units and click on the sales organization which should not be picked automatically. In this case the sales organization *Test* should not be used.

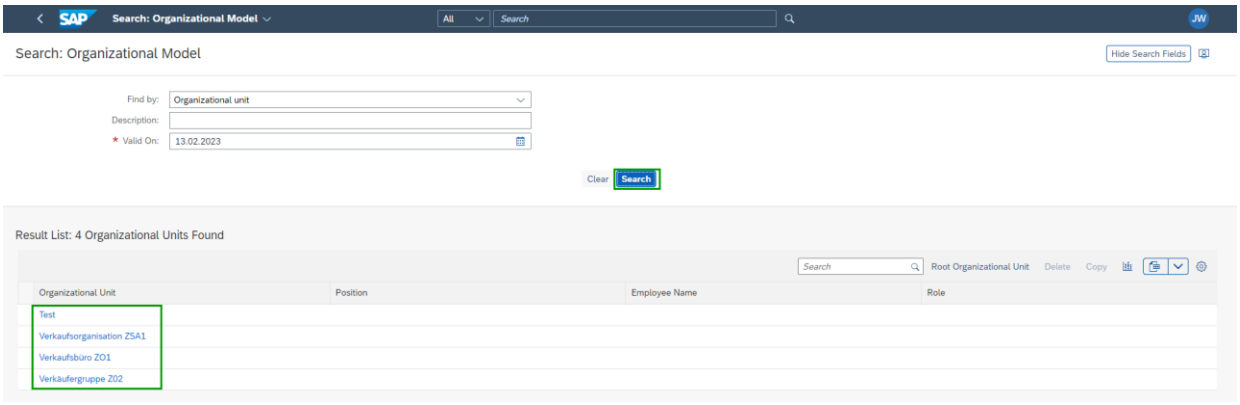


Figure 63 Organizational Units

Go to *Organizational Unit Details* and uncheck the boxes for Sales and Service. The sales organization *Test* is no longer used automatically.

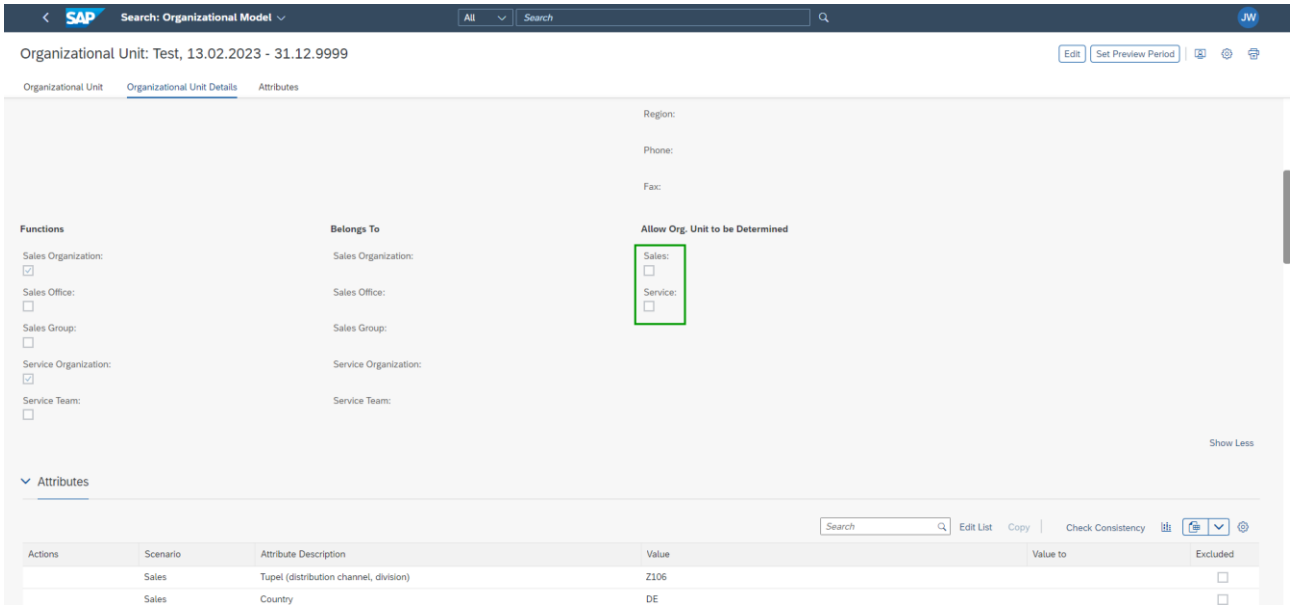


Figure 64 Organizational Unit *Test*

Also, the sales organization ZSA1 was missing some entries to function correctly.

Therefore, open the Fiori Launchpad and open the app *Search Organizations*. Filter organizational units and click on the sales organization which should be edited.

Go to *Attributes* and scroll to Scenario Sales to enter the requested data for:

- Tupel (distribution channel, division)
- Country
- Ref. currency for document
- Division
- Distribution Channel
- Postal Code
- Region

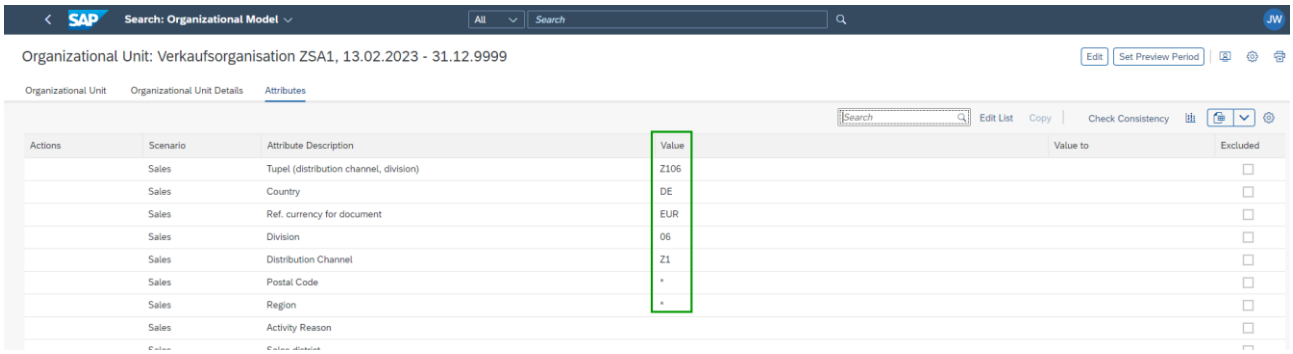


Figure 65 Attributes Sales: Sales Organization *ZSA1*

Be aware to also scroll further to the Scenario Service to enter the requested data for:

- Country
- Postal Code
- Region

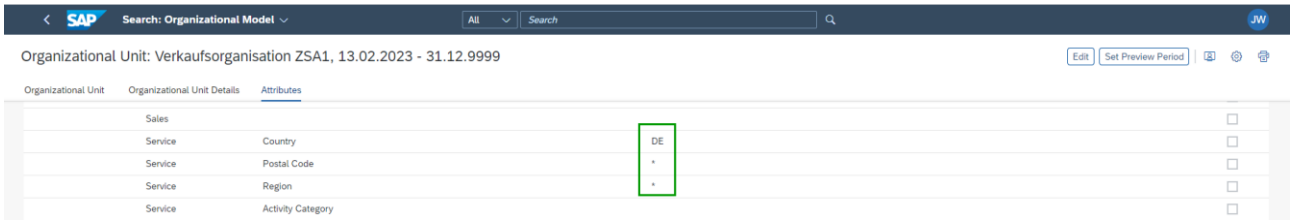


Figure 66 Attributes Service: Sales Organization *ZSA1*

8.1.2 Maintain Determination Rules

Determination rules specify which fields are taken into account when the system determines organizational data from transaction data.

This function also provides a test for determination rules which were assigned to transaction types. Therefore, go to *Service > Master Data > Organizational Management > Organizational Data Determination > Change Rules and Profiles > Maintain Determination Rules*.

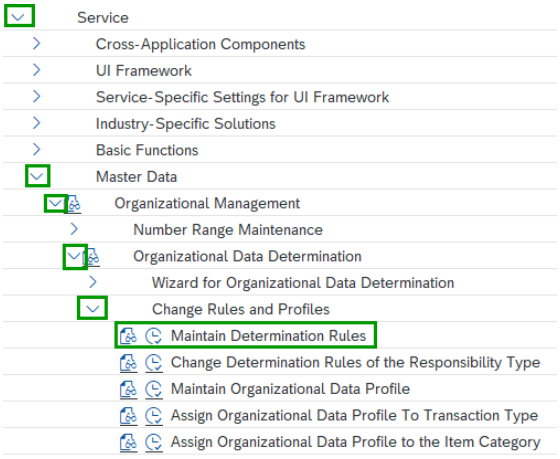


Figure 67 Path to "Maintain Determination Rules"

Enter the rule which will be tested, and press enter. In this case the rule 10000276 is tested. Click on the button *display* .

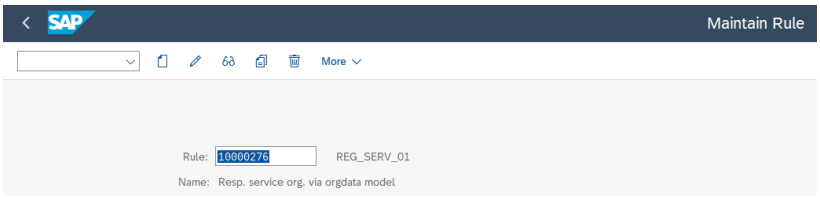


Figure 68 Maintain Rule

To test the rule, click on the button *Simulate Rule Resolution* or press SHIFT+F8. Another screen opens.

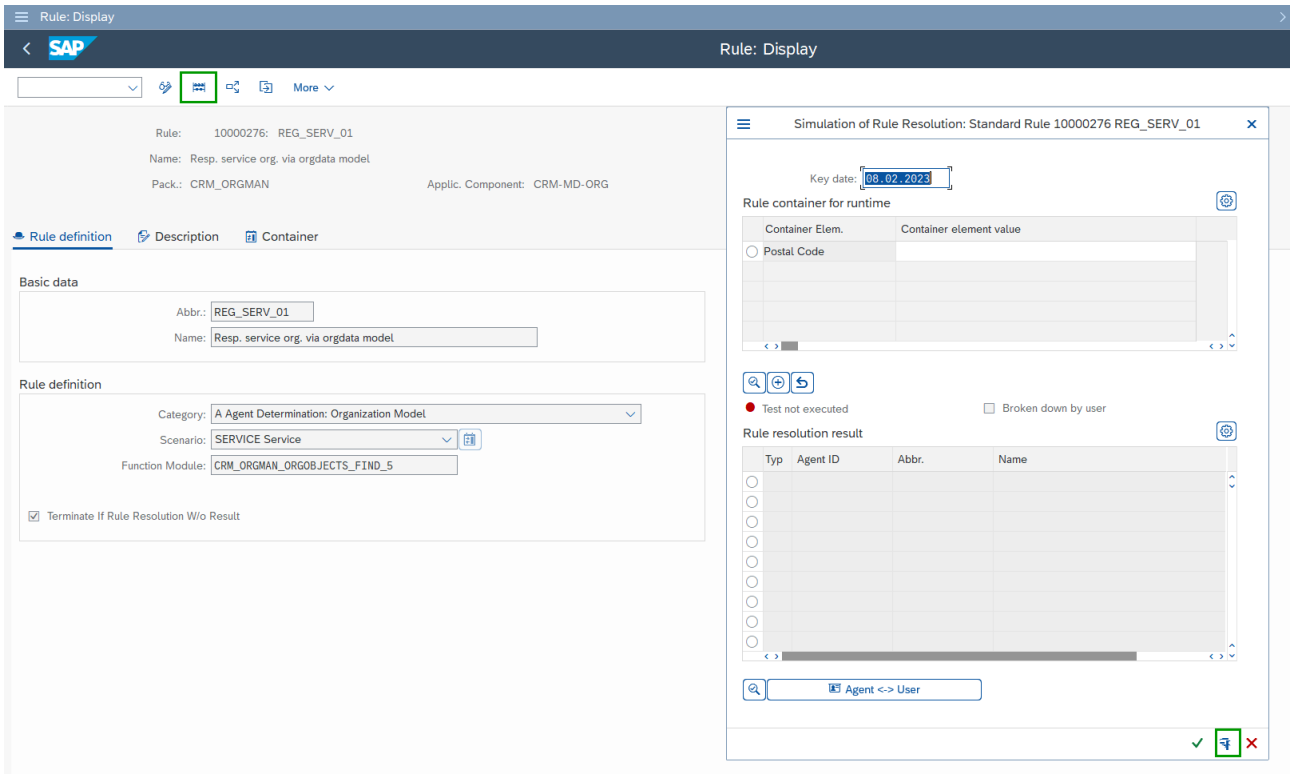


Figure 69 Simulation of Rule Resolution

For this rule, the postal code is a trigger to find the right sales organization and fill it automatically. Fill in a real postal code and press enter or use the button *execute test*. The rule resolution result shows a sales organization.

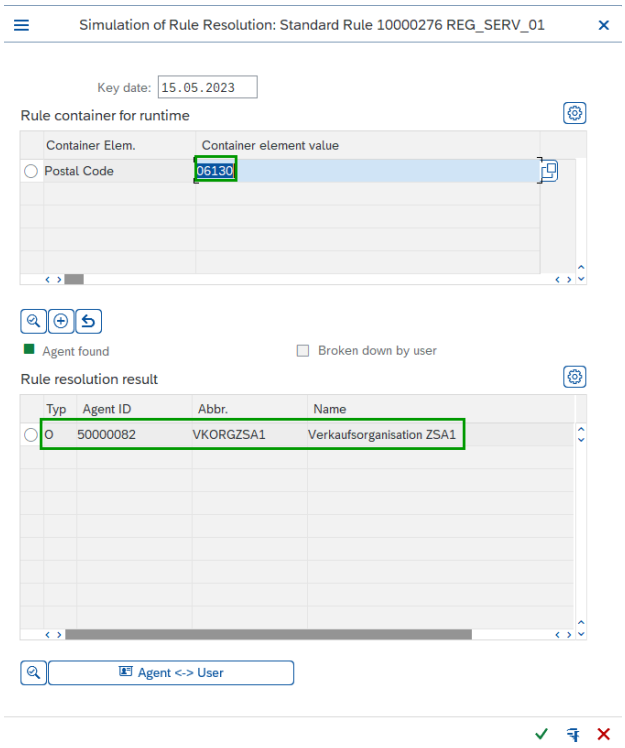


Figure 70 Simulation of Rule Resolution: Result

If more than one sales organization is maintained the result will show more than one entry. This function can be used to check if the data of the organizational model is saved as wanted.

8.1.3 Maintain Organizational Data Profile

When determining organizational data, the system takes the organizational data profile defined in customizing and the determination rules from this profile.

Organizational data profiles can be created for different transaction types by entering mandatory fields for transactions as well as determination rules (standard roles) for organizational data determination.

To maintain organizational data profiles, go to *Service* > *Master Data* > *Organizational Management* > *Organizational Data Determination* > *Change Rules and Profiles* > *Maintain Organizational Data Profile*.

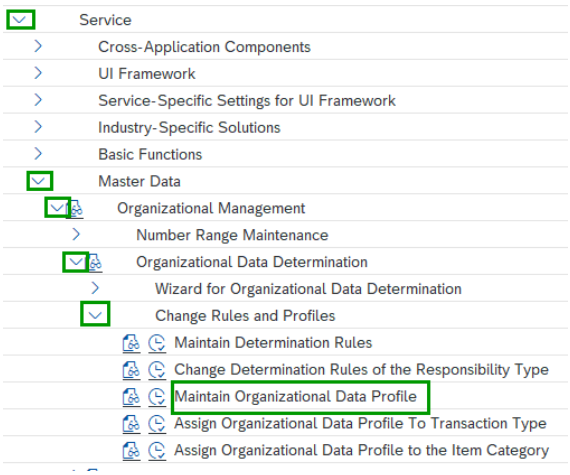


Figure 71 Path to Maintain Organizational Data Profile

Two scenarios with the same organizational profile were copied.

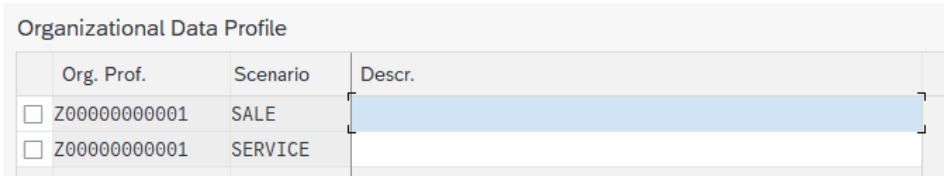


Figure 72 Organizational Data Profile

Copy the organizational profile 000000000001 Standard Org.Data Profile (Header) with scenario SALE (Sales) to Z00000000001. While copying change the Organizational Model Determination Rule to 10000166 (Det. Acc. to partner attr.) and uncheck the boxes for Sales Organization and Distribution Channel.

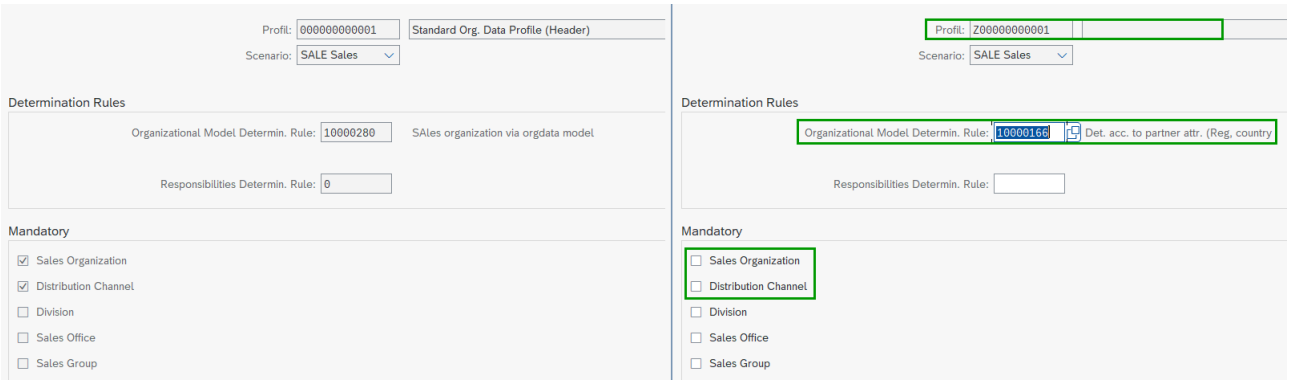


Figure 73 Organizational Data Profile Sales

Copy the organizational profile 000000000001 Standard Org.Data Profile (Header) with scenario SERVICE (Service) to Z00000000001 without any changes.

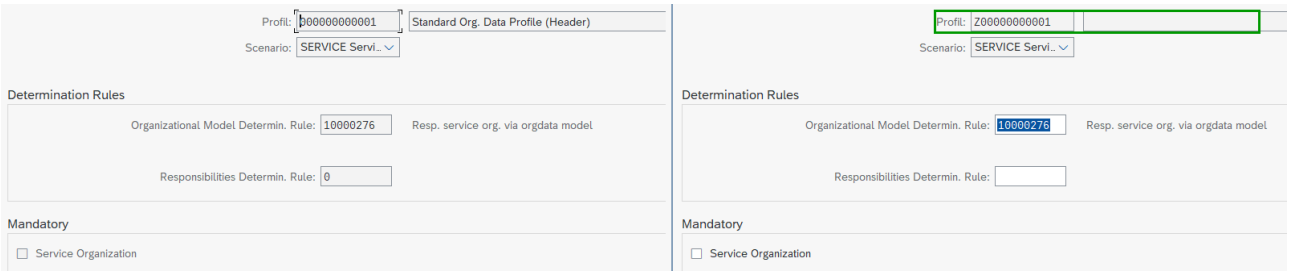


Figure 74 Organizational Data Profile Service

8.1.4 Assign Organizational Data Profile to Transaction Type

To assign organizational data profiles to transaction types, go to *Service > Master Data > Organizational Management > Organizational Data Determination > Change Rules and Profiles > Assign Organizational Data Profile to Transaction Type*.

This transaction defines the same data as described in chapter 4.

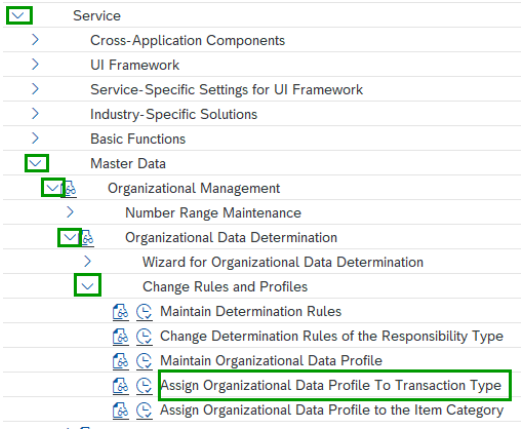


Figure 75 Path to Assign Organizational Data Profile To Transaction Type

8.1.5 Assign Organizational Data to the Item Category

To assign organizational data profiles to the item category, go to *Service* > *Master Data* > *Organizational Management* > *Organizational Data Determination* > *Change Rules and Profiles* > *Assign Organizational Data Profile to the Item Category*.

This transaction defines the same data as described in chapter 4.

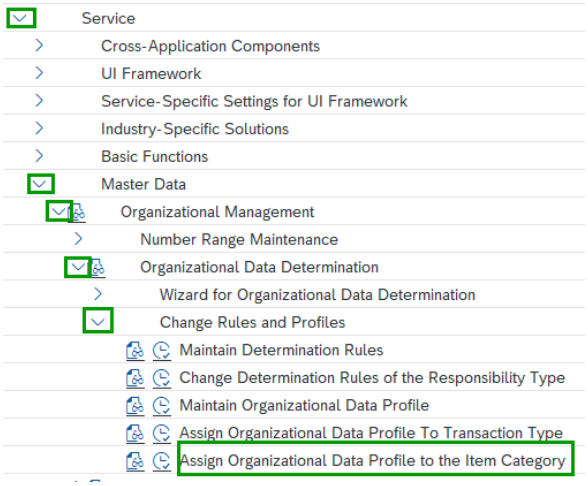


Figure 76 Path to Assign Organizational Data Profile to the Item Category