

**Halliburton**

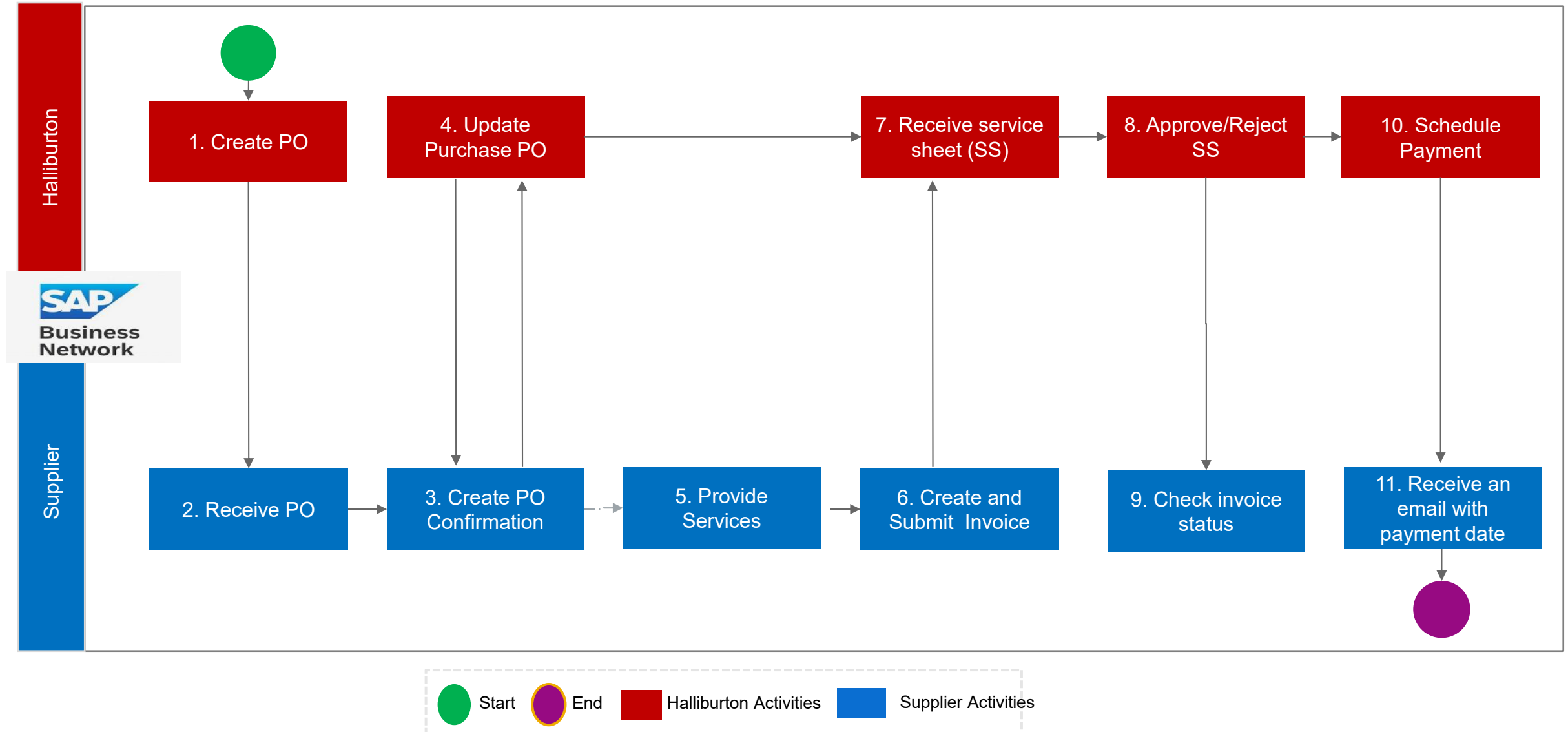
Purchase Order/Invoice for  
Unplanned PO line

**HALLIBURTON**



# PO to Invoice Collaboration Process (Service PO)

Let us discuss the process of PO to Invoice collaboration with SAP Business Network



# Planned vs Unplanned Service order

SAP Business Network enhances service procurement by accommodating both planned and unplanned service line items in purchase orders, allowing for greater flexibility and control over service-based spend.

	Planned Service Order	Unplanned Service Order
Description	Halliburton will normally issue Planned service orders where the type of service and value are displayed as Child lines (line 10.10)	On limited occasions, service purchase orders may not include child lines but have a \$value that is limited. These are called unplanned service orders where the type of service will be determined at the time of completion.
PO view	NO Contingency Lines	Contingency Lines
PO view	1 PO line can contain multiple child lines.	1 PO line can contain multiple child lines.
Invoice Submission	One invoice per PO line	One invoice per PO line
Invoice Creation	Plan service require supplier to invoice per PO qty and unit price.	Unplan/Contingency service require supplier to add service line (labor or material) and the qty and unit price.
Invoice creation	Quantity can be change	Quantity or unit price can be changed as long as it's not exceeded the PO limit.

# Unplanned Service invoice:

In SAP Business Network, a Service Purchase Order (PO) can include both planned and unplanned service lines. Unplanned service lines are used when the full scope of the service isn't known at the time of the initial purchase order. The Unplanned Service PO Parent Line serves as a placeholder for these services, and the actual details (like quantities and costs) are added later when the service is performed.

It is easy to identify a Service Purchase Order (PO) with unplanned service lines.

Line Items							
Line #	No. Schedule L	Part # / Description	Type	Return	Qty (Unit)	Need By	Unit Price
▼ 00001	1		Service			31 Jan 2025	
00001.10		Water pipe leaking	Service Contingency Line		1.000 (JOB) ⓘ		\$500.00 SGD
00001.20		Labor cost	Service Contingency Line		1.000 (EA) ⓘ		\$1,500.00 SGD
		Supply cost					
▼ 00002	1		Service			31 Jan 2025	
		Leak Test, dew point check & Seal withN					
00002.10			Service Contingency Line		1.000 (JOB) ⓘ		\$1,200.00 SGD
		Calibration & main tank safety PRV					
00002.20			Service Contingency Line		1.000 (JOB) ⓘ		\$800.00 SGD
		MPI Test with Report					

- 1** The **Unplanned Service PO Parent Line** serves as a placeholder for these services, and the actual details (like quantities and costs) are added later when the service is performed
- 2** The **Unplanned Service PO Child Line** When the supplier create invoice, they add child line items detailing the specific services and/or materials used.
- 3** A supplier would add the specific **contingency** as a child line item under **the unplanned service line**, detailing the service performed and its cost, ensuring the total remains within the limit set on the parent unplanned service.

# Create Invoice for Unplanned Service Line – General Steps

For unplanned service lines, the process of creating a **full** invoice and a **partial invoice** starts with the same nine steps. After this shared beginning, the procedures for each type diverge.

The screenshot shows the SAP Business Network Workbench interface. The top navigation bar includes 'Home', 'Enablement', 'Opportunities', 'Discovery', 'Workbench' (highlighted with a red box and step 1), 'Orders', 'Fulfillment', 'Invoices', 'Payments', and 'More'. Below the navigation bar, the 'Workbench' section displays a dashboard with several tiles: 'Invoices' (13), 'Orders' (64, highlighted with a red box and step 2), 'Orders to invoice' (12), 'New orders' (46), 'Items to confirm' (0), 'Items to ship' (0), and 'Order' (1). Below the dashboard, the 'Orders (64)' section is visible. It includes a search bar with 'Order numbers' and a text input field containing '4517265470' (highlighted with a red box and step 3). Below the input field, there are radio buttons for 'Partial match' and 'Exact match' (selected). To the right of the input field is an 'Apply' button (highlighted with a red box and step 4). Below the search bar, there is a table with the following columns: 'Order Number', 'Customer', 'Amount', 'Date', 'Order Status', 'Amount Invoiced', and 'Actions'. The first row of the table is highlighted with a red box and step 5, showing the order number '4517265470'.

Order Number	Customer	Amount	Date	Order Status	Amount Invoiced	Actions
4517265470	Halliburton - TEST	\$37.45 USD	Jul 11, 2025	Confirmed		...

Log in to your SAP Business Network supplier account.

- 1 **Locate the Purchase Order:** Navigate to your **Workbench** and
- 2 select the **Orders** tile to view all POs.
- 3 Use the search or filter functions to find the specific PO you need to invoice. Type PO number and select **Exact Match**
- 4 Then click **Apply** . The PO number will appear below
- 5 Click on the **PO number** to open it.

# Create Invoice for Unplanned Service Line – General Steps

Purchase Order: 4302291797

Create Order Confirmation ▼

Create Ship Notice

Create Service Sheet

Create Invoice ▼

Order Detail

Order History

HALLIBURTON

From:  
Customer  
Halliburton Energy Services, Inc.  
3000 N Sam Houston Pkwy E  
HOUSTON, Texas 77032  
United States  
Phone:  
Fax:

To:  
GULF COAST PAPER CO INC-TEST  
3705 Houston Hwy  
Victoria, TX 77901-4767  
United States  
Phone: +297 2074  
Fax:  
Email: [nelson.m.saldanha@accenture.com](mailto:nelson.m.saldanha@accenture.com)

Standard Invoice

Line-Item Credit Memo

Line-Item Debit Memo

6

Purchase Order  
(Confirmed)  
4302291797  
Amount: \$88,044.15 USD  
Version: 1

6 **Important:** A Purchase Order must be confirmed before you can create an invoice.

7 From the Purchase Order screen, click the **Create Invoice** button and select **Standard invoice**. This will take you to the invoice creation screen. ***“Select Item to Create invoice with Auto Generated Service Sheet”*** screen will open up

Select Item to Create Invoice with Auto-Generated Service Sheet

Next

Exit

Line Items

8

00001

Part ID / Description

Create Step File - CFD Analysis

00002

Complete Component Parts

Service Sheet Required.

Next

Exit

**Note:** One purchase order line can contain multiple parent lines. Only one invoice is allowed per line item. For example, screenshot on the left, purchase order has 2 parent lines, user will need to create two invoices for this purchase order.

8 Select the Line Item for invoice creation. Only One line can be selected



# Create Invoice for Unplanned Service Line – General Steps

Create Invoice

PreviousUpdateSaveExit

Invoice Header

Summary

9

Invoice #:

\*

Invoice Date:

\*

11 Jul 2025

Subtotal:

\$0.00 USD

Total Tax:

\$0.00 USD

Total Gross Amount:

\$0.00 USD

Total Net Amount:

\$0.00 USD

Amount Due:

\$0.00 USD

Service Description:

Supplier Tax ID:

Remit To:

GULF COAST PAPER CO INC-TEST

Bill To:

Victoria, TX  
United States  
Halliburton TechnologyPartners LLC  
HOUSTON, Texas  
United States

View/Edit

Tax ⓘ

Header level tax ⓘ

Line level tax ⓘ

Category:

Sales Tax

Location:

Description:

Regime:

Taxable Amount:

\$0.00 USD

Tax Rate Type:

Rate(%):

Tax Amount:

Supplier:

GULF COAST PAPER CO INC-TEST

Victoria, TX  
United States

Choose Address

Halliburton Technology Partners, LLC

Customer:

Halliburton Technology Partners, LLC

HOUSTON, TX  
United States

Email:

**Enter Header-Level Invoice Information:** Complete all the mandatory fields in the invoice header, which are marked with an asterisk (\*). This includes:

- 9 Invoice Number
- Invoice Date (Automatically populates with the current date and cannot be backdated. Future dates are allowed.
- Tax Information (Enter Zero percent if Tax is not applicable)
- Service Start and End Date
- Any other required header-level details.

# Create Invoice for Unplanned Service Line – General Steps

The process for creating either a full invoice or a partial invoice begins with the same steps. After this initial set of steps, the procedures for each type of invoice will differ.

In the next slides, the steps for different scenarios are explain:

- An invoice for the **Full Amount Scenario**
- An invoice for the **Partial Amount Scenario**



# Create Invoice for Unplanned Service Line – Full Amount Scenario

1 Line Items, 0 Included, 0 Previously Fully Invoiced

Line Items

Insert Line Item Options

☐ Tax Category:
 

▼

☐ Discount

Add to Included Lines

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
	00002				Complete					
▼					Component					
					Parts					
	00002.10	<input type="checkbox"/>	SERVICE		Complete		0	JOB ⓘ	\$25,000 USD	\$0 USD
					Component					

Add/Update ▼

Exc

▼

00002

Complete Component Parts

00002.10

☒

SERVICE

Complete Component Parts

## To create an invoice for Unplanned Service Line with **FULL** amount

**A** Select an **Include** toggle switch and the line item will be included on the invoice

**Final step:** To ensure there are no errors on the invoice, select the **Update** Button.

To **submit** the invoice you just created, click **Next**. The invoice summary screen will be displayed. Check all the entered details, then click **Submit**.

### Pricing Details

Price Unit: JOB ⓘ

Price Unit Quantity: 1.000

# Create Invoice for Unplanned Service Line – Partial Amount Scenario

To create an invoice for Unplanned Service Line **with Partial amount**

Line Items

1 Line Items, 0 Included, 0 Previously Fully Invoiced

Insert Line Item Options

☐ Tax Category:

☐ Discount

Add to Included Lines

No.

Include

Type

Part #

Description

Customer Part #

Quantity

Unit

Unit Price

Subtotal

00002

Complete

Component

Parts

No.

Include

Type

Part #

Description

Customer Part #

Quantity

Unit

Unit Price

Subtotal

00002.10

☐

☐

SERVICE

Complete

0

JOB ⓘ

\$25,000 USD

\$0 USD

Component

Add/Update ▾

Add Contract/Catalog Items

Add General Service

Add Labor Service

Add Material

No.

Include

Type

Part #

Description

Customer Part #

Quantity

Unit

Unit Price

Subtotal

00002

Complete Component Parts

00002.10

☐

☐

SERVICE

Complete Component Parts

0

JOB ⓘ

\$25,000 USD

\$0 USD

ed line items cannot be modified.

1

☒

SERVICE

Service Period

Service Start Date:

Service End Date:

A

On the line-item details: click **Add/Update** and select **Add Generic Service** option

B

Enter the all require fields.  
**Description** of the services completed  
**Quantity:** No decimal allowed, QTY = 1  
**UOM**  
Enter the partial **Amount** of the line item

# Create Invoice for Unplanned Service Line – Partial Amount Scenario

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
00002				Complete Component Parts					

! The subtotal under this line exceeds limit.

C

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
00002.10	<input type="checkbox"/>	<input type="checkbox"/>	SERVICE	Complete Component Parts		0	JOB ⓘ	\$25,000 USD	\$0 USD

Excluded line items cannot be modified.

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	SERVICE		Deliver training for the first week		1	HR	\$6,000 USD	\$6,000.00 USD

Service Period

Service Start Date:

Service End Date:

Line Item Actions ▾Delete

After user creates a partial amount invoice line item the next step Delete the original line from your invoice

- C Select Original Invoice Line and
- D Click on **Delete** button

**Final step:** To ensure there are no errors on the invoice, select the Update Button. To **submit** the invoice you just created, click **Next**. The invoice summary screen will be displayed. Check all the entered details, then click **Submit**.

# Thank you!

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