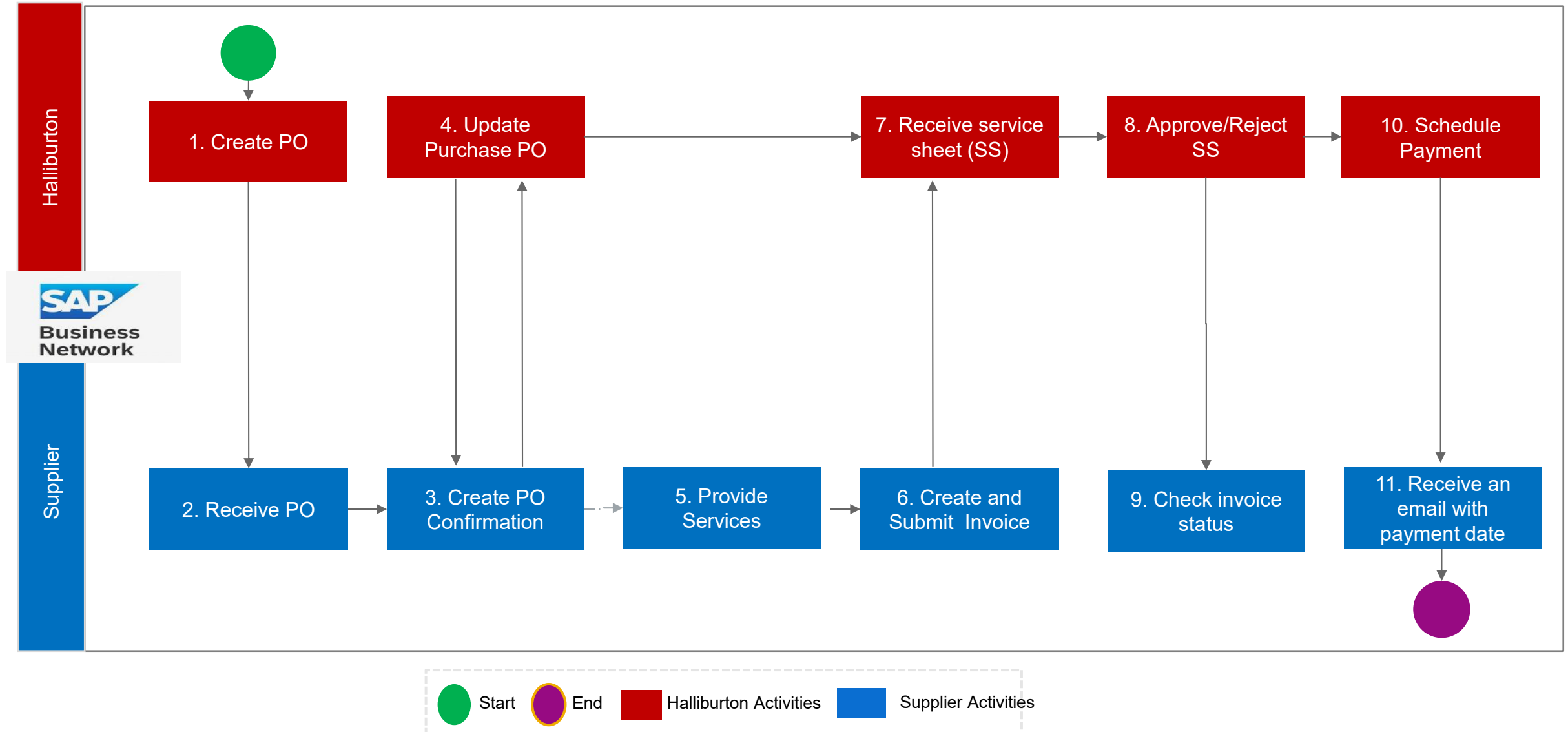**SAP** Business Network

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.

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

The **Unplanned Service PO Child Line** When the supplier create invoice, they add child line items detailing the specific services and/or materials used.

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.

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

(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

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

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**

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.**

Create Invoice for Unplanned Service Line – **Partial Amount Scenario**

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 Component		0	JOB ⓘ	$25,000 USD	$0 USD

Add/Update ▾
Add Contract/Catalog Items
Add General Service
Add Labor Service
Add Material

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

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

No.	Include	Type	Part #	Description		Customer Part #	Quantity	Unit	Unit Price	Subtotal
00002				Complete Component Parts						Add/Update
00002.10	⬭	SERVICE		Complete Component Parts			0	JOB ⓘ	$25,000 USD	$0 USD

...led line items cannot be modified.

| 1 | 🔵 | SERVICE | [   ] | [   ] | | [   ] | [   ] | [   ] | [   ] | [   ] |

Required field

Service Period

Service Start Date: [📅]   Service End Date: [📅]

Create Invoice for Unplanned Service Line – **Partial Amount Scenario**

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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