

Integration with SAP Field Service Management

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1 Purpose

SAP Field Service Management can be integrated with SAP S/4HANA Service to optimize the field service process. SAP Field Service Management supports field service technicians with real-time, automated workforce scheduling, planning, and dispatching for employees and provides self-service options for field service needs. With SAP Field Service Management, you can support your technicians with mobile capabilities and enable them to excel at their work. The service orders created in SAP S/4HANA are replicated to SAP Field Service Management and updates of the service confirmations are sent back to SAP S/4HANA.

The integration is done via SAP Cloud Integration which helps in the integration process, error handling, and message processing. The integration ensures a seamless, fast, and flexible delivery of field services, and therefore helps to provide more efficient customer services. It increases customer satisfaction by providing proactive customer service.

Note Values in this test script (decimal notation, date formats, and so on) are presented in U.S. standard notation. If your test system is set up to use a different notation, enter values as appropriate.

2 Prerequisites

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

2.1 System Access

The test should be conducted with the following system:

Note: For the system details, contact your system administrator.

| System | Details |
|---|--|
| SAP S/4HANA System | Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |
| SAP Field Service Management – SAP FSM | Accessible via SAP Field Service Management. Your system administrator provides you with the URL to access the various apps assigned to your role. |
| Cloud Integration Package with SAP Cloud Platform Integration – SAP CPI | Accessible via SAP CPI. Your system administrator provides you with the URL to access the various apps assigned to your role. |

2.2 Roles

Create business roles using the following business role templates delivered by SAP and assign them to your individual test users.

Alternatively, if available, you can use the following spaces delivered by SAP. You create a space with pages containing predefined essential apps and assign it to the business role. You then assign this business role to your individual users.

For more information, refer to *How to Create a Business Role for the Administrator* in the [product assistance](#) for SAP S/4HANA.

| Name (Role Template) | ID (Role Template) | Name (Space) | ID (Space) | Log On |
|--|-------------------------------|---------------------------------|-------------------------------|---|
| Customer Service Manager | SAP_BR_CUSTO-MER_SRVC_MANAGER | Service Management | SAP_BR_CUSTO-MER_SRVC_MGR | Your system administrator provides the user and password information. |
| Master Data Specialist - Business Partner Data | SAP_BR_BUPA_MASTER_SPECIALIST | Master Data - Business Partners | SAP_BR_BUPA_MASTER_SPECIALIST | Your system administrator provides the user and password information. |

| Name (Role Template) | ID (Role Template) | Name (Space) | ID (Space) | Log On |
|---------------------------------------|-------------------------------|------------------------|-------------------------------|---|
| Master Data Specialist - Product Data | SAP_BR_PRODMAS-TER_SPECIALIST | Master Data - Products | SAP_BR_PRODMAS-TER_SPECIALIST | Your system administrator provides the user and password information. |
| Pricing Specialist | SAP_BR_PRICING_SPECIA-LIST | Price Management | SAP_BR_PRICING_SPECIA-LIST | Your system administrator provides the user and password information. |

Use the following standard test users or assign roles to testers for SAP Field Service Management, respectively:

| Name | ID | Log On |
|---------------------------------------|----|---|
| Service Technician - Customer Service | | Your system administrator provides the user and password information. |
| Service Planner | | Your system administrator provides the user and password information. |

2.3 Master Data, Organizational Data, and Other Data

Remember: The external IDs of most of the master data objects in SAP Field Service Management must be filled with the IDs of the corresponding SAP S/4HANA objects.

2.3.1 Field Mapping Between SAP S/4HANA and SAP Field Service Management

Field mapping between service orders and service calls:

| Service Order in SAP S/4HANA | Service Call in SAP Field Service Management |
|---------------------------------|--|
| Service Order Description | Subject |
| Priority | Priority |
| Equipment ID | Equipment |
| Requested Start | Start |
| Requested End | Due |
| Employee Responsible | Responsible |
| Sold-To Party/Service Recipient | Customer |

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Prerequisites

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| Service Order in SAP S/4HANA | Service Call in SAP Field Service Management |
|---|--|
| Stock and non-stock Service Product Items | Reserved Material |

Field mapping between service product item and activity:

| Service Product Item in SAP S/4HANA | Activity in SAP Field Service Management |
|-------------------------------------|--|
| Product Item Description | Subject |
| Quantity | Original Estimate |
| Equipment ID | Equipment |
| Executive Service Employee | Responsible |
| Planned Start | Planned start date |
| Planned End | Planned end date |

Field mapping for service contract between SAP S/4HANA Service and SAP Field Service Management:

| SAP S/4HANA | SAP Field Service Management |
|----------------------------------|------------------------------|
| ID combined with Item No. | Code |
| Sold-To Party | Business Partner |
| Product description of line item | Name |
| Contract Start | Start Date |
| Contract End | Contract End |
| Equipment | Equipment |
| Notes | Notes |

2.3.2 Priority Value Mapping

| Priority in SAP S/4HANA | Priority in SAP Field Service Management |
|-------------------------|--|
| Low | Low |
| Medium | Medium |
| High | High |
| Very High | High |

2.3.3 SAP Field Service Management Mobile Application

You can use the following link to download the SAP Field Service Management application to a mobile device: https://help.sap.com/viewer/fsm_getting_started/Cloud/en-US/download-mobile-app.html. You can run it on iOS, Android, and Windows.

2.4 Preliminary Steps

Make sure that the steps described in the guide [Setting Up Service Order Processing with SAP Field Service Management](#) have been performed successfully.

2.5 Multiple Company Integration Scenario

We can replicate business objects from SAP S/4HANA On-Premise/Private Cloud to one or more companies in SAP Field Service Management. For more information please refer to the [integration guide](#), section Multiple Company Integration Scenario. In the below table you can find different business objects mapped to different FSM Companies based on specific rules

| Business Object | Rule Type | Relevant Value | FSM Company |
|------------------|------------|----------------|-------------|
| Customer (Sales) | Sales Area | 1710 10 00 | Company A |
| | | 5410 10 00 | Company B |

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| Business Object | Rule Type | Relevant Value | FSM Company |
|--------------------------------|----------------|----------------|-------------|
| Supplier (Purchasing) | Purchasing Org | 1710 10 00 | Company A |
| | | 5410 10 00 | Company B |
| Materials - Service Product | Sales Area | 1710 10 00 | Company A |
| | | 5410 10 00 | Company B |
| Materials - Spare Parts | Plant | 1710 | Company A |
| | | 5410 | Company B |
| Equipments/Functional Location | Plant | 1710 | Company A |
| | | 5410 | Company B |
| Service Contract | Sales Area | 1710 10 00 | Company A |
| | | 5410 10 00 | Company B |
| Service Order | Sales Area | 1710 10 00 | Company A |
| | | 5410 10 00 | Company B |

The multiple company mapping configurations are defined in the path **SAP Customizing Implementation Guide > Service > Integration with Other SAP Solutions > SAP Field Service Management-> Configure Multiple Company Replication** in transaction SPRO.

For more information please refer to the [integration guide](#), section Multiple Company Mapping Configuration in SAP S/4HANA Cloud.

Once the mapping configuration is done in SAP S/4HANA, the mapping data is synchronized to SAP Cloud Integration as a new value mapping artifact titled **Value Mapping for Multiple Company determination in SAP Field Service Management from SAP S4HANA** in the **SAP S/4HANA Integration with SAP Field Service Management** package using the **Synchronize Multiple Company Mapping Configuration** integration artifact.

EnableMultiCompanyReplication parameter is set to true in the standard integrations of master and transactional data from SAP S/4HANA to SAP Field Service Management, the integration flow will retrieve mapping details of the multiple companies from the value mapping artifact instead of the default company and account that is configured.

3 Overview Table

This process variant starts with the creation of a service order. The key characteristic is that a total billed amount is calculated on the basis of time and material.

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

You can use the search bar to find all other apps not listed on the homepage.

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 and release a service contract | Customer Service Manager | Create Service Contract | A standard service contract has been created. |
| Create a service order | Customer Service Manager | Create Service Order | A standard service order has been created. |
| Release a service order line item (optional) | Customer Service Manager | Create Service Order | An item of the service order has been released. |
| Change the service order (optional) | Customer Service Manager | Create Service Order | The service order has been changed. |
| Release the service order | Customer Service Manager | Create Service Order | The service order has been released. |
| FSM Dispatcher | Service Planner/Dispatcher | SAP Field Service Management | The service call activities are available for dispatching. |
| Technician starts working | Service Technician - Customer Service | SAP Field Service Management Mobile App | Report the time and material spent on the activity |
| Approve the activities | Service Planner/Dispatcher | SAP Field Service Management | Service confirmation is created accordingly. |
| Verify the service order and service confirmation | Customer Service Manager | Search Service Order | Service confirmation is created automatically and reflected in the Transaction History tab. The life cycle status of the service order is set to Completed. |

4 Test Procedures

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

4.1 E2E Scenario: Synchronize a Service Contract from S/4HANA Cloud to FSM

4.1.1 Create a Service Contract and Release it to FSM

Purpose

The Service Manager creates and releases service contracts in the Fiori App "Manage Service Contract"

- Create a Service Contract and release it to FSM, please refer to the chapter **Create Service Contract** in 426 Service Contract Management.

4.1.2 Check Service Contract in FSM

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

This step describes how to check a Service Contract in SAP Field Service Management ().

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|-----------------------------------|---|--|-----------------------|
| 1 | Log On | Log on to FSM as <i>Back Office Master Data Manger</i> . | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Select FSM Company | In the top right corner, click on the User Profile icon and select the <i>Company</i> from the dropdown for which replication was configured. | The screen <i>Planning and Dispatching</i> will be refreshed. Note If multiple company configuration is maintained for service contract select the appropriate FSM Company . | |
| 3 | Open Screen Master Data | In the drop-down field on the top left of the screen, select <i>Master Data</i> . | The screen <i>Master Data</i> is displayed | |
| 4 | Open Service Contract list | In the left navigation bar, choose <i>Service Contract</i> . | The Service Contract list is displayed. | |
| 5 | Search Service Contract | In the search area, enter the code, description or ID of the service contract in S/4HANA. Choose a service contract in the result list. | The details of the service contract is displayed. Note If a service contract is set to Complete in S/4 HANA, the corresponding service contract in FSM will be set to Closed . | |

4.2 E2E Scenario: Create a Service Order in SAP S/4HANA and Release It to SAP Field Service Management

4.2.1 Create a Service Order with Line Items

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

This step describes how to create a service order in a standard scenario where items are billed on the basis of fixed prices.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|--|-----------------------|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori Launchpad with access to the <i>Search Service Order</i> application is displayed. | |
| 2 | Open the Search Service Order application | Choose the <i>Search Service Order</i> application tile. | The app <i>Search Service Order</i> opens. | |
| 3 | Create Service Order | <p>Choose <i>New</i> from the result list.</p> <p>In the pop-up screen <i>Select Transaction Type</i>, select the <i>Transaction Type</i> (e.g. SRVO – Service Order).</p> <p>Enter the following data to create a service order:</p> <ul style="list-style-type: none"> • <i>Sold-To Party</i> • <i>Description</i> <p>In the section <i>Parties Involved</i>, enter a valid <i>Employee Responsible</i>.</p> <p>In the section <i>Organization Data</i>, enter the following data.</p> <ul style="list-style-type: none"> • <i>Sales Organization</i> | <p>A new service order has been created.</p> <p>The edit view of the service order will be opened.</p> | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---------------------|--|---|-----------------------|
| | | <ul style="list-style-type: none"> • <i>Sales Organizational Unit</i> • <i>Distribution Channel</i> In the pop-up <i>Contract Assignment</i> , choose <i>No Assignment</i> . Choose <i>Save</i> . | | |
| 5 | Create Items | Choose the <i>Items</i> tab or scroll down to the <i>Items</i> area. Add the following items as sub items of the service bundle: <ul style="list-style-type: none"> • <i>Product ID</i> • <i>Quantity</i> • <i>Unit</i> Choose Enter . In the pop-up <i>Contract Assignment</i> , choose <i>No Assignment</i> . Check that the service order has no errors. Make sure that the service order is in status Open . Choose <i>Save</i> . When a service team is enabled in SAP S/4HANA Service, the service team is mandatory for all the items. If multiple service teams meet the determination rule, choose one entry in the pop-up window. | A service order including an item has been created. | |

4.2.2 Release a 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. |

Purpose

In this step, you release a line item of the service order that you created earlier. This is a prerequisite for a follow-up confirmation of that line item.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|---|---|--|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori launchpad with access to the <i>Search Service Order</i> application is displayed. | |
| 2 | Open the Search Service Order application | Choose the <i>Search Service Order</i> application tile. | The list report page is displayed. | |
| 3 | Find Service Order | In the search area on the top, enter <your description> in the filter <i>Description</i> or enter the ID of your service order in the <i>Search</i> field. Choose <i>Go</i> . | Your service order is displayed in the list report within <i>Manage Service Orders</i> . | |
| 4 | Open Service Order in the Edit mode | Choose <i>Edit</i> for your service order in the list. | The Edit view of the service order opens. | |
| 5 | Release Service Order | In the tab area <i>Service Order Details</i> , change the <i>Status</i> from Open to Released Choose <i>Save</i> . | The service order has been released. A service call with an activity is created in SAP Field Service Management. | Note down the Service Call number for later use. |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---------------------------------|---|---|--|
| | | | <p>The service call ID is visible in the service order header, tab <i>Transaction History</i>.</p> <p>The IDs of the activities in SAP Field Service Management are visible in the service order items, tab <i>Transaction History</i>.</p> | The Service Call Id can also be found on the Service Order → Transaction History → FSM Service Call. |
| 6 | Navigate to service call | <p>Choose the <i>Transaction History</i> tab in your Service Order to see the FSM service call code.</p> <p>Click on the FSM service call code.</p> | <p>Corresponding Service Call is displayed.</p> <p>Note If multiple company configuration is maintained for service order select the appropriate FSM Company.</p> | |

4.3 E2E Scenario: Update a Released Service Order in SAP S/4HANA and Re-release It

4.3.1 Update a Service Order with Line Items

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

This step describes how to update a released service order in a standard scenario.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|---|--|-----------------------|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori launchpad with access to the <i>Search Service Order</i> application is displayed. | |
| 2 | Open the Search Service Order application | <ul style="list-style-type: none"> Choose the <i>Search Service Order</i> application tile. Search for your service order and select it. Choose <i>Edit</i>. | The <i>Search Service Order</i> app opens. | |
| 3 | Edit and Change Service Order Header | <p>Change the status of the service order to <i>In Process</i>.</p> <p>Change the following properties of the service order header:</p> <ul style="list-style-type: none"> <i>Description</i> <i>Priority</i> <i>Requested End Date/Time</i> Section <i>Notes: Note</i> Section <i>Parties Involved: Employee Responsible</i>. | | |
| 4 | Change Service Order Items | <p>In the section <i>Items</i>, go to the replicated service item (Product ID CSSRV_01), choose <i>Edit</i> and change the existing item:</p> <ul style="list-style-type: none"> <i>Quantity</i> <i>Requested Start/Due date/time</i> <i>Product description</i> In the section <i>Notes</i>: Change the note. Choose <i>back</i>. If the <i>Contract Assignment</i> dialog pops up, choose <i>No Assignment</i>. <p>Go back to <i>Items</i>.</p> | <p>The service order has been saved. Changes are replicated to SAP Field Service Management.</p> <p>In SAP Field Service Management, the service call displays all changed values correctly.</p> <p>The service call is in status <i>New</i> and is not visible in the <i>Dispatching Board</i> anymore.</p> | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|------------------------------------|--|---|--|
| | | Edit an item of category service part and change the quantity. Go back to Service Order Details . Choose Save to save the service order. | | |
| 5 | Re-Release of Service Order | Select the service order and set its status to Released by either of the following: <ul style="list-style-type: none"> • Editing the service order again, setting the status to Released, and pressing the Save button • Choosing Release. | The service order is saved. The changes are replicated to SAP Field Service Management. In SAP Field Service Management, the service call displays all changed values correctly. The service call is in status Ready-to-plan and is visible in the Dispatching Board again. The IDs of the activities in SAP Field Service Management are visible in the service order items, tab Transaction History . | The changed properties are visible in SAP Field Service Management, the integration flow processing is successful. |

4.4 E2E Scenario: Update a Service Order in SAP S/4HANA When a Service Call or Activity is Updated in SAP Field Service Management

4.4.1 Dispatch Plan and Release Activity

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 step, you assign the activity to a service technician and release the assignment.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|--|---|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The <i>Planning and Dispatching</i> screen is displayed. | |
| 2 | Find Service Call | In the Dispatching Board, search for the service call under Service call subject using the description you specified for the service order. | The service call is displayed. | |
| 3 | Assign Technician | <p>In the Dispatching Board there is a list of technicians with a specific skill set. (place the cursor on a technician name to see the skill set).</p> <p>Drag and drop the service call on to the appropriate technician based on the skill set required.</p> <p>Select today's date in the Planning Board if it's not already updated.</p> <p>Select all the assignments relevant to the service call and then assign the service call to the selected technician.</p> <p>Attention: Currently, there is no mapping between SAP S/4HANA Service and SAP Field Service Management for service teams. When dispatching an activity to a service technician in SAP Field Service Management, please make sure the service technician belongs to the service team assigned to the service order in SAP S/4HANA. Otherwise a re-determination of the service team will be triggered in SAP S/4HANA. If the service technician belongs</p> | The service call assigned to the technician is displayed in the Planning Board. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---------------------------|--|---|-----------------------|
| | | to multiple service teams, the automatic assignment in SAP S/4HANA will lead to an error that has to be resolved manually. Consequently, it is advantageous if you use a service technician that is assigned to exactly one service team in SAP S/4HANA. | | |
| 4 | Release assignment | On the Dispatching Board, select all the assignments and choose <i>Release Assignments</i> (in the top-right corner of the board). | The assignment is released and the technician is added as Executing Service Employee to the service item in the respective service order. | |

4.4.2 Reassign Service Technician and Release Activity (Optional)

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 step, you can reassign another service technician to the activity and release the assignment.

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---------------------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Find Activity | In the Dispatching Board, find the activity you have released by technician name. | The assigned activity is displayed under the certain technician in the Dispatching Board. | |
| 3 | Reassign Activity | In the Dispatching Board, drag and drop the released activity on to the other appropriate technician based on the skill set required. | The previous activity is removed from the Dispatching Board. A new activity has been created and assigned to the appropriate technician. | |
| 4 | Release Assignment | Select the new activity and choose <i>Release Assignments</i> (in the top-right corner of the board). | The assignment is released. For the new activity, a new service order item in status Released is created in the SAP S/4HANA system and a new technician is assigned to this new activity. | |

4.4.3 Duplicate Activity and Release Assignments (Optional)

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 step, you duplicate the activity for another service technician and release the assignment.

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---------------------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Find Activity | In the Dispatching Board, find the activity you have released by technician name. | The assigned activity is displayed under the certain technician in the Dispatching Board. | |
| 3 | Duplicate Activity | In the Dispatching Board, select the activity and choose <i>More</i> on the upper right side of the pop-up window. Place your cursor onto <i>Duplicate for</i> and choose the other appropriate technician. | A new activity is created for the second technician. | |
| 4 | Release Assignment | Select the new activity, choose <i>Release Assignments</i> (in the top-right corner of the board). As for the new activity, a new service order item in the SAP S/4HANA system will be created with the release status mapping to this new activity. | The assignment is released. The ID of the activity is visible in the service order item, tab <i>Transaction History</i> . | |

4.4.4 Upload Attachment to a Service Call

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

You can to upload attachments to service calls. These attachments are replicated to service orders on the SAP S/4HANA side.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|--|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Find Service Call | In the Dispatching Board, search for the service call under Service call subject using the description you specified for the service order. | The service call is displayed. | |
| 3 | Upload Attachment | On the service call detail page, upload an attachment under Attachments . | <p>The attachment is assigned to the service call and is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is assigned to the corresponding service order.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the 230le Customer Service Manager. Choose the <i>Search Service Order</i> application tile. Search for your service order and select it <p>You find the attachment on the tab <i>Attachments</i>.</p> | |
| 4 | Delete Attachment | Choose the trash bin icon in the Hamburger menu to delete the attachment and trigger a deletion replication to SAP S/4HANA. | <p>The attachment is deleted in the service call and the deletion is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is deleted.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the 230le Customer Service Manager. Choose the <i>Search Service Order</i> application tile. Search for your service order and select it | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|----------------|-------------|---|-----------------------|
| | | | The attachment on the tab <i>Attachment</i> is not available anymore. | |

4.4.5 Upload Attachment to an Activity

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

You can upload attachments to activities. These attachments are replicated to service order items on the SAP S/4HANA side.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|----------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|---|--|-----------------------|
| 2 | Find Activity | In the Dispatching Board, find the activity you have released by technician name. | The assigned activity is displayed under the specific technician in the Dispatching Board. | |
| 3 | Upload Attachment | On the activity detail page, find the area to upload an attachment. | <p>The attachment is assigned to the activity and is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is assigned to corresponding service order.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the 250le Customer Service Manager. Choose the Search Service Order application tile. Search for your service order and select it <p>You find the attachment on the corresponding service order item on the Attachments tab.</p> | |
| 4 | Delete Attachment | Choose the trash bin icon in the Hamburger menu to delete the attachment and trigger the deletion replication to SAP S/4HANA. | <p>The attachment is deleted on the activity and the deletion is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is deleted.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the role Customer Service Manager. Choose the Search Service Order application tile. Search for your service order and select it <p>The attachment on the Attachments tab is not available anymore.</p> | |

4.5 E2E Scenario: Create Service Order with Items in SAP S/4HANA When Service Call or Activity Is Created in SAP SAP Field Service Management

4.5.1 Create Service Call

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 step, you create a new service call in SAP Field Service Management which is then replicated to SAP S/4HANA as a new service order.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: Value | Expected Result | Pass / Fail / Comment |
|-------------|--|--|------------------------------------|-----------------|-----------------------|
| 1 | Log on to SAP Field Service Management | a. Log on to SAP Field Service Management as a Service Planner/Dispatcher. b. Open the Service Calls view | | | |

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: Value | Expected Result | Pass / Fail / Comment |
|-------------|---|---|------------------------------------|---|---|
| | | c. Press the <i>Create</i> button in the bottom-right corner. | | | |
| 2 | Create a New Service Call | <p>a. a.Enter values for the following fields of the service call.</p> <ul style="list-style-type: none"> - <i>Customer</i> - <i>Contact Person</i> - <i>Subject</i> - <i>Priority</i> - <i>Earliest Start date/time</i> - <i>Due date/time</i> - <i>Responsible</i> - <i>Service call remarks</i> - <i>Resolution</i> - <i>Equipment</i> <p>b. Choose the ✓ icon to save the service call.</p> | | | <div style="border: 1px solid black; padding: 5px;"> <p>Note: To select mutiple equipments on Service Call, navigate to FSM Admin Web App -> Select the FSM Company -> Company Settings -> Search Equipment and set SAP.FSM.SC.Emquipment.Mode value to 1.</p> </div> |
| 3 | Check the Result in SAP Cloud Integration Monitoring | <p>a. Log on to SAP Cloud Integration.</p> <p>b. You should see a message for the 'Replicate Service Call from SAP Field Service Management to SAP S4HANA'</p> <p>c. Make sure that the message is in status Completed.</p> | | The message reaches SAP S/4HANA successfully. | |
| 4 | Check the Result in SAP S/4HANA | <p>a. Log on with your user to the corresponding Fiori UI.</p> <p>b. Choose <i>Search Service Order</i>.</p> <p>c. Search for your service order.</p> <p>d. Depending on the Customizing and test data used, it is possible that the service order was created with errors.</p> <p>Go to the header section:</p> | | | <p>When you create a new service call in SAP Field Service Management, there's always an activity created implicitly as well.</p> <p>For this test step, you should have no items for the new service order.</p> |

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: Value | Expected Result | Pass / Fail / Comment |
|-------------|----------------|---|------------------------------------|-----------------|---|
| | | <p>e. Check that the sold-to party is correct. f. Check that the description is correct. g. Check that the contact is correct. h. Check that the priority is correct (see section 2.3.2 for mapping details). i. Check that requested start is correct (earliest start date/time). j. Check that requested end is correct (due date/time). k. Check that the status is set to Open.</p> <p>Go to the <i>Parties Involved</i> section. l. Check that the employee responsible is correct.</p> <p>Go to the <i>Reference Objects</i> section. m. Check that a reference object entry with the chosen equipment is available and flagged as main.</p> <p>Go to <i>Transaction History</i> section. n. Check that the service call entry has the correct code assigned.</p> <p>Go to <i>Notes</i> section. o. There should be two notes available. p. Check that your resolution note is displayed as a problem description. q. Check that your service call remarks are displayed as an internal note.</p> | | | <div data-bbox="1472 418 1881 581" style="border: 1px solid gray; padding: 5px;"> <p>Note: When multiple equipments are replicated from Service Call to Service Order in S4, the first equipment (alphabetical order) is marked as main equipment</p> </div> |

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: Value | Expected Result | Pass / Fail / Comment |
|-------------|--|---|------------------------------------|-----------------|-----------------------|
| 5 | Check Result in SAP Field Service Management | a. Log on to the SAP Field Service Management. b. Open the <i>Service Calls</i> view. c. Open your service call. d. Check that the external ID of the service call is correct. e. Check that the status of the service call is New (this is set by the integration flow for each new service call). | | | |

4.5.2 Create Activity

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 step, you create a new activity in SAP Field Service Management which is then replicated to SAP S/4HANA as new service order item.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: Value | Expected Result | Pass / Fail / Comment |
|-------------|---|---|------------------------------------|---|---|
| 1 | Log on to SAP Field Service Management | a. Logon to SAP Field Service Management. b. Open the <i>Service Calls</i> view. c. Open your service call from the previous test step. | | | |
| 2 | Create a New Activity | a. Enter values for the following fields of the activity. - <i>Subject</i> - <i>Planned start date</i> - <i>Planned end date</i> - <i>Notes</i> (for the technician) - <i>Equipment</i> - <i>Original estimate</i> b. Choose the ✓ icon. | | | If the original estimate is not filled, the planned duration is mapped to SAP S/4HANA quantity as a fallback. |
| 3 | Check the Result in CPI Monitoring | a. Log on to SAP Cloud Integration. b. You should see a message for the 'Update Service Order for New Activity from SAP Field Service Management to SAP S4HANA'. c. Check that the message is in status Completed. | | The message reaches SAP S/4HANA successfully. | |
| 4 | Check the Result in SAP S/4HANA | a. Log on with your user to the corresponding Fiori UI. b. Choose <i>Search Service Order</i> . c. Search for your service order. d. Check that your service order has no errors and is now in status Released. e. Check that your service order item was created with status Released. | | | |

| | | | | | |
|---|---|---|--|--|--|
| | | <p>Open your service order item and go to the <i>General Information</i> section.</p> <p>f. Check that the description is correct.</p> <p>g. Check the actual duration and quantity have the correct values.</p> <p>Go to the <i>Timeline</i> section.</p> <p>h. Check that earliest planned start and latest planned end is correct</p> <p>Go the <i>Notes</i> section. Your note should have been replicated as item text.</p> <p>Got to the <i>Reference Objects</i> section.</p> <p>i. Check that the chosen equipment is assigned and flagged as main.</p> <p>Go to the <i>Transaction History</i> section.</p> <p>j. Check that the activity entry has the correct code assigned.</p> | | | |
| 5 | Check the Result in SAP Field Service Management | <p>a. Log on to SAP Field Service Management.</p> <p>b. Open the <i>Service Calls</i> view.</p> <p>c. Open your service call.</p> <p>d. Check that the external ID of the new activity is correct.</p> | | | |

4.6 E2E Scenario: Create a Completed Service Confirmation in SAP S/4HANA When Time Effort, Expense, or Material Is Approved in SAP Field Service Management

4.6.1 Technician Starts Working on Activity

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 step, a technician starts working on the assigned activity.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|-----------------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Technician - Customer Service on a mobile device. | The message <i>Change company</i> is displayed. | |
| 2 | Choose company | Choose the company you belong to, for example <i>Company 3</i> . | The message <i>Company has never been synchronized</i> is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|---|---|-----------------------|
| 3 | Sync | Choose <i>Sync</i> . | The screen showing all the assignments assigned to technician is displayed. | |
| 4 | Choose Activities | <ul style="list-style-type: none"> Choose the Hamburger menu icon in the top left of the screen; Select <i>Activities</i>. Choose the assigned activity from the list. | The screen showing <i>Service Call Description, Status, Customer, Address, Responsible, Reserved Material, and Assignment details</i> is displayed. | |
| 5 | Choose travel | Choose <i>Travel</i> at the bottom of the screen. | The screen Are you ready to start travelling is displayed. | |
| 6 | Start work | Choose <i>Work</i> at the bottom right. | The message I confirm is displayed. | |
| 7 | Confirm | Choose <i>Confirm</i> . | The screen showing all the service details is displayed. | |

4.6.2 Updates Time, Used Reserved Material, and Add Expenses

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 step, the technician updates the time, expenses, and reserved material used.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|---|-----------------------|
| 1 | Log on (Optional) | Log on to SAP Field Service Management as a Service Technician - Customer Service on a mobile device. | The message <i>Change company</i> is displayed. | |
| 2 | Sync (Optional) | Choose the company you belong to and then choose <i>Sync</i> . | The screen showing all the assignments of the technician is displayed. | |
| 3 | Choose Activities (Optional) | Choose the assigned activities from the list. | The screen showing <i>Service Call Description, Status, Customer, Address, Responsible, All Reserved Material,</i> and <i>Assignment Details</i> is displayed. | |
| 4 | Choose Reserved Material (Optional) | Choose <i>Reserved materials > Use > Save</i> . | The reserved material is updated. This step is mandatory only when the service calls are derived from the service orders that are created with spare parts to be procured. | |
| 5 | Choose Create | Choose <i>Create</i> ('+') at the bottom of screen. | The screen showing <i>Attachment, Checklist Expense, Effort, Feedback Code, Follow Up Material,</i> and <i>Mileage</i> is displayed. | |
| 6 | Choose Material | Choose <i>Material</i> from the list. | The <i>Create Material</i> screen is displayed. | |
| 7 | Update Unplanned Material | Choose the item code, change the quantity if necessary; then choose <i>Save</i> . Make sure that the quantity in the individual stock for unplanned material in the SAP S/4HANA system is sufficient. Otherwise, it will cause errors when creating a confirmation. | The unplanned material is updated. | |
| 8 | Choose Create | Choose <i>Create</i> ('+') at the bottom of screen. | The screen showing <i>Attachment, Checklist Expense, Effort, Feedback Code, Follow Up Material,</i> and <i>Mileage</i> is displayed. | |
| 9 | Choose Effort | Choose <i>Effort</i> from the list. | The screen showing <i>New Effort</i> is displayed. | |
| 10 | Update Effort | Choose <i>Time Entry > Working time</i> . Update the working time. | The time effort is updated. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|-----------------------|--|---|-----------------------|
| | | Choose <i>Effort Type</i> and then choose <i>Save</i> . | | |
| 11 | Choose Create | Choose <i>Create</i> ('+') at the bottom of screen. | The screen showing <i>Attachment, Checklist Expense, Effort, Feedback code, Follow up material</i> and <i>Mileage</i> is displayed. | |
| 12 | Choose Expense | Choose <i>Expense</i> from the list. | The screen showing <i>Create Expense</i> is displayed. | |
| 13 | Update Expense | Choose <i>Type > Expense type > Currency</i> . Enter an amount under <i>Internal Amount</i> or <i>External Amount</i> . Choose <i>Save</i> . | The expense is updated. | |

4.6.3 Finish Work and Close Activity

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 step, the technician completes and confirms the activity.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------------------|---|---|-----------------------|
| 1 | Log on (Optional) | Log on to SAP Field Service Management as a Service Technician - Customer Service on a mobile device. | The message <i>Change company</i> is displayed. | |
| 2 | Sync (Optional) | Choose the company you belong to, then choose <i>Sync</i> . | The screen showing all the assignments of the technician is displayed. | |
| 3 | Choose Assignments (Optional) | Choose an assigned assignment from the list. | The screen showing <i>Service call description, Status, Customer, Address, Responsible, Reserved material, and Assignment</i> details is displayed. | |
| 4 | Checkout | Choose <i>Checkout</i> . Choose <i>Confirm – Efforts</i> . Choose <i>Save</i> . | The screen <i>Preview Report</i> is displayed. | |
| 5 | Choose Preview Report | Choose <i>Preview Report</i> – Choose <i>Sync</i> . | A service report is generated. | |
| 6 | Sign | Choose <i>CLICK TO SIGN HERE – Sign</i> and update your name. | The screen showing <i>Confirmed and closed</i> is displayed. | |
| 7 | Done | Choose <i>Done</i> . | The screen with the list of the activities is displayed. | |
| 8 | Activity Status | Choose the activity from the list of activities. Check the status of the activity. | The screen <i>Status – Closed</i> is displayed. | |

4.6.4 Manager Approves Time Effort/Expense and Material

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 step, the planner approves the time effort, expenses, and material used. A service confirmation is automatically created in SAP S/4HANA once the planner approves the time and expenses in SAP Field Service Management.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Navigate to Time and Expenses | Choose <i>Time and Material Journal</i> . | The screen showing <i>Time effort, Expense, Material, Mileage, and Overview</i> is displayed. | |
| 3 | Approve Time Effort | Choose <i>Time Effort</i> at the top of the board. Choose your service call using the description from the list of service calls and choose <i>Approve</i> . | The time effort added by the technician is approved. Once the time effort is approved in SAP Field Service Management, a confirmation for the service order is created automatically. | |
| 4 | Approve Expense | Choose <i>Expense</i> at the top of the board. Choose your service call using the description from the list of service calls and choose <i>Approve</i> . | The expense added by the technician is approved. Once the expenses are approved in SAP Field Service Management, a confirmation for the service order is created automatically. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|--|-----------------------|
| 5 | Approve Material | Choose <i>Material</i> at the top of the board. Choose your service call using the description from the list of service calls and choose <i>Approve</i> . | The material added by the technician is approved. Once the material is approved in SAP Field Service Management, a confirmation for the service order is created automatically. | |
| 6 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori Launchpad with an access to the <i>Search Service Order</i> application is displayed. | |
| 7 | Open Manage Service Order application | Choose the <i>Search Service Order</i> application tile. | The list report page is displayed. | |
| 8 | Find Service Order | In the search area at the top, enter <i><your description></i> in the filter <i>Description</i> or enter the ID of your service order in the search field. Choose <i>Go</i> . | Your service order is displayed in the report list within <i>Search Service Order</i> . | |
| 9 | Service Confirmation | Choose the <i>Transaction History</i> tab. | The completed service confirmation is displayed in the <i>Transaction History</i> tab. | |

4.7 E2E Scenario: Complete a Service Order in SAP S/4HANA

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

Once a service order is completed the corresponding service call is automatically changed to Technically Complete in SAP Field Service Management.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|---|-----------------------|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori Launchpad with an access to the <i>Manage Service Order</i> application is displayed. | |
| 2 | Open Search Service Order application | Choose the <i>Manage Service Order</i> application tile. | The list report page is displayed. | |
| 3 | Find Service Order | In the search area at the top, enter <i><your description></i> in the filter <i>Description</i> or enter the ID of your service order in the search field. Choose <i>Go</i> . | Your service order is displayed in the report list within <i>Manage Service Orders</i> . | |
| 4 | Mark Service Order as Complete | Select the service order found and choose <i>Edit</i> . Under <i>Status</i> , select <i>Completed</i> and choose <i>Save</i> . | Your service order is displayed as <i>Completed</i> . | |
| 5 | Check Service Order | Check if the service order is complete. | Once the service order is complete in SAP S/4HANA, the corresponding service call in SAP Field Service Management is set to <i>Technically Complete</i> . | |

4.8 E2E Scenario: Create a Service Order in SAP S/4HANA and Release It to SAP Field Service Management

4.8.1 Create a Service Order with Line Items

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

This step describes how to create a service order in a standard scenario where items are billed on the basis of fixed prices.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|----------------|--|---|-----------------------|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori Launchpad with access to the Search Service Order application is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|--|-----------------------|
| 2 | Open the Search Service Order application | Choose the <i>Search Service Order</i> application tile. | The app <i>Search Service Order</i> opens. | |
| 3 | Create Service Order | <p>Choose <i>New</i> from the result list.</p> <p>In the pop-up screen <i>Select Transaction Type</i>, select the <i>Transaction Type</i> (e.g. SRVO – Service Order).</p> <p>Enter the following data to create a service order:</p> <ul style="list-style-type: none"> • <i>Sold-To Party</i> • <i>Description</i> <p>In the section <i>Parties Involved</i>, enter a valid <i>Employee Responsible</i>.</p> <p>In the section <i>Organization Data</i>, enter the following data.</p> <ul style="list-style-type: none"> • <i>Sales Organization</i> • <i>Sales Organizational Unit</i> • <i>Distribution Channel</i> <p>In the pop-up <i>Contract Assignment</i>, choose <i>No Assignment</i>.</p> <p>Choose <i>Save</i>.</p> | <p>A new service order has been created.</p> <p>The edit view of the service order will be opened.</p> | |
| 5 | Create Items | <p>Choose the <i>Items</i> tab or scroll down to the <i>Items</i> area.</p> <p>Add the following items as sub items of the service bundle:</p> <ul style="list-style-type: none"> • <i>Product ID</i> • <i>Quantity</i> • <i>Unit</i> <p>Choose Enter.</p> <p>In the pop-up <i>Contract Assignment</i>, choose <i>No Assignment</i>.</p> <p>Check that the service order has no errors.</p> <p>Make sure that the service order is in status Open.</p> <p>Choose <i>Save</i>.</p> <p>When a service team is enabled in SAP S/4HANA Service, the service team is mandatory for all the items. If multiple service teams meet the determination rule, choose one entry in the pop-up window.</p> | A service order including an item has been created. | |

4.8.2 Release a 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. |

Purpose

In this step, you release a line item of the service order that you created earlier. This is a prerequisite for a follow-up confirmation of that line item.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|---|-----------------------|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori launchpad with access to the Search Service Order application is displayed. | |
| 2 | Open the Search Service Order application | Choose the Search Service Order application tile. | The list report page is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|---|---|--|
| 3 | Find Service Order | In the search area on the top, enter <your description> in the filter <i>Description</i> or enter the ID of your service order in the <i>Search</i> field. Choose <i>Go</i> . | Your service order is displayed in the list report within <i>Manage Service Orders</i> . | |
| 4 | Open Service Order in the Edit mode | Choose <i>Edit</i> for your service order in the list. | The Edit view of the service order opens. | |
| 5 | Release Service Order | In the tab area <i>Service Order Details</i> , change the <i>Status</i> from Open to Released Choose <i>Save</i> . | The service order has been released. A service call with an activity is created in SAP Field Service Management. The service call ID is visible in the service order header, tab <i>Transaction History</i> . The IDs of the activities in SAP Field Service Management are visible in the service order items, tab <i>Transaction History</i> . | Note down the Service Call number for later use. The Service Call Id can also be found on the Service Order → Transaction History → FSM Service Call. |
| 6 | Navigate to service call | Choose the <i>Transaction History</i> tab in your Service Order to see the FSM service call code. Click on the FSM service call code. | Corresponding Service Call is displayed. Note If multiple company configuration is maintained for service order select the appropriate FSM Company . | |

4.8.3 Reject a Service Order

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

In this step a line items of the previously created service order will be cancelled.

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 . | The Fiori Launchpad with access to the <i>Manage Service Order</i> application is displayed. | |
| 2 | Open Manage Service Order application | Choose the <i>Manage Service Order</i> application tile. | The list report page is displayed. | |
| 3 | Find Service Order | In the search area on the top, enter <your description> in the filter <i>Description</i> or enter the ID of your service order in the <i>Search</i> field. Choose <i>Go</i> . | Your service order is displayed in the report list within <i>Manage Service Orders</i> . | |
| 4 | Open Service Order | Click on your Service Order in the list | The Service Order will be opened. | |
| 5 | Reject the Service order | In the header are click on three dots. In the <i>Reject Service Order</i> pop-up, select any <i>Rejection Reason</i> Choose <i>OK</i> . Under <i>Status</i> , select <i>Completed</i> and choose <i>Save</i> . Choose <i>Save</i> . | The status of Service Order and the line items will be in <i>Completed</i> | |
| 6 | Navigate to service call | Choose the <i>Transaction History</i> tab in your Service Order to see the FSM service call code. | Corresponding Service Call is displayed and status will be Technically Completed. The Activities will be in Cancelled state. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|----------------|--|---|-----------------------|
| | | Click on the FSM service call code. Check the status of Service Call and Activities | Note If multiple company configuration is maintained for service order select the appropriate FSM Company . | |

4.9 E2E Scenario: Create a Maintenance Order in SAP S/4HANA and Release It to SAP Field Service Management

4.9.1 Create Maintenance Order

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

Order processing helps you to plan maintenance tasks in greater detail, for example, those tasks from a malfunction report. You decide whether the tasks to be performed and what components (materials) you need for them.

Furthermore, the maintenance order is used to collect all costs for a maintenance task and to debit the cost center that incurred the costs using the settlement functions in the CO module (Controlling). This process step shows you how to create maintenance order.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---|---|--|-----------------------|
| 1 | Log On | Log on to the SAP Fiori launchpad as a Maintenance Planner. | The SAP Fiori launchpad is displayed. | |
| 2 | Start Search | Choose <i>Search</i> in the upper right area of the launchpad. | An input field is displayed. | |
| 3 | Search Criteria | Choose dropdown list as: <i>Apps</i> and input <i>Create Maintenance Order</i> from previous section. | <i>Create Order</i> screen should be displayed | |
| 5 | Create Order | On the <i>Create Order</i> screen, choose <i>Order type : Maintenance Order PM01</i> , <i>Techninca Obeject : <></i> , <i>Priority : <Example : 2-High></i> <i>Planning Plant : <Example : 1710></i> then choose <i>OK</i> . | | |
| 6 | Enter Details | On the <i>Create Maintenance Order:%00000000001</i> screen, go to the <i>General Data</i> tab. Make the following entries: <i>Description</i> : < Enter description for the Maintenance Order > <i>Main Work Center</i> | | |
| 7 | Provide Estimated Costs | Go to the <i>Costs</i> tab. Make the following entries: <i>Estimated Costs</i> : <value for estimated costs of order > Note The <i>Estimated Costs</i> field is above the <i>Costs</i> table. | | |
| 8 | Defines the Operations to be Performed to Resolve the Malfunction | Go to the <i>Operation Data</i> tab. This selection brings you to the operation overview. Make the following entries in the <i>Operations</i> table for <i>Operation 0010</i> : <i>Work</i> : <Entry of your choice > <i>Number of Capacities</i> : <2 > The system calculates the duration of the operation based on the time you entered in the <i>Work</i> field and on how many people you schedule in the <i>Number</i> field to perform this operation. You have now made all of the entries in the header data screen of the order. | | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|-----------------|---|-----------------|-----------------------|
| 9 | Select Material | <p>Choose line of operation 0010 and choose <i>Materials</i> tab at the bottom of the screen.</p> <p>On the <i>Materials</i> tab, make the following entries: <i>Variant: standard</i></p> | | |
| 10 | Structure List | <p>For a stock material:</p> <p>Choose <i>Select from Structure List</i>.</p> <p>On the <i>Select Material Component</i> screen, choose a Stock item of Item Category L (For examples: <i>SP001</i>).</p> <p>Choose <i>OK</i>.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note To duplicate a material line in the list with all item data, choose <i>Copy Material</i>. You can then change specific fields in the copied line.</p> </div> | | |
| 11 | Add Services | <p>Choose line of operation 0010 and choose services tab at the bottom of the screen.</p> <p>Service without Service Material</p> <p>Make the following entries:</p> <ul style="list-style-type: none"> • <i>Description</i> : <i>Service Material 01</i> • <i>Quantity</i>: <1> • <i>Unit</i>:<H> • <i>Plant</i>: 1710 • <i>Price</i>: <i>Entry of your choice</i> • <i>Purchasing Org</i>: 1710 • <i>Purchasing Group</i>: 001 • <i>Supplier</i> 17300001 • <i>G/L Account</i>: 65008000 • <i>Material Group</i>: YBMM01 <div style="border: 1px solid black; padding: 5px;"> <p>Note You can choose <i>Settings</i> button to add or remove fields in the screen.</p> </div> | | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---|--|---|-----------------------|
| | | <p>Note This case does not apply for Brazil because Tax as a Service (TaaS) uses codified service only to calculate taxes.</p> <p>Service with Service Material Make the following entries:</p> <ul style="list-style-type: none"> • <i>Product</i>: SM0001 • <i>Quantity</i>: <1> | | |
| 12 | Maintain Settlement Rule (Optional) | <p>Settlement rule must be maintained if the costs in the order has to be settled before business close of the order.</p> <p>To maintain the settlement rule, follow these steps:</p> <ol style="list-style-type: none"> 1. Go to the <i>Costs</i> tab. 1. Choose the default settlement rule as settlement rule. <p>The settlement receiver is inherited from the technical object that is maintained in the maintenance order. If it is not inherited, the settlement receiver can be maintained manually based on the settlement profile that is assigned to the maintenance order.</p> | Settlement rule has been maintained. | |
| 13 | Check Entries | Choose <i>Check Entries</i> in the upper left corner of the screen. | Entries have been checked. | |
| 14 | Save Order | Choose <i>Save</i> . | <p>Order 4000XXX is saved with Notification 1XXXXXXX. The selected stock material is reserved automatically.</p> <p>Note To check, log on to the SAP Fiori launchpad as a Warehouse Clerk. Open <i>Display Stock Overview</i>. Enter the stock material, plant, and storage location and choose <i>Environment</i>. Choose <i>Reservation</i>.</p> | |
| 15 | Check Purchase Requisition Number for Non-Stock Material Items | <p>Select the row for operation 0010 and choose the <i>Materials</i> tab and <i>Services</i> tab respectively at the bottom of the screen.</p> <p>Make a note of the purchase requisition number for non-stock material and services in the <i>PR Number</i> field.</p> | The purchase requisition number is displayed in the respective field. | |

4.9.2 Release Maintenance Order

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

The maintenance order is used to collect all costs for a maintenance task and to debit the cost center that incurred the costs using the settlement functions in the CO module (Controlling). This process step shows you how to release maintenance order.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---|--|---|-----------------------|
| 1 | Log On | Log on to the SAP Fiori launchpad as a Maintenance Planner. | The SAP Fiori launchpad displays. | |
| 2 | Access the App | Open <i>Find Maintenance Order</i> (F2175). | The <i>Maintenance Order</i> screen is displayed. | |
| 3 | Search for Order Number | On the Maintenance Order screen, make the following entries: <i>Order Type: Maintenance Order (PM01)</i> Choose GO . Choose the order that you created in the previous step. | Order list is displayed. | |
| 4 | Navigate to Change Maintenance Order | Choose <i>Related Apps</i> at the upper right corner of the screen, and choose <i>Change Maintenance Order</i> . | Change Maintenance Order screen is displayed. | |
| 5 | Set Order Status | Choose <i>Set System Status > Release</i> and choose <i>Save</i> . | The maintenance order is released. | |

4.10 E2E Scenario: Update a Maintenance Order in SAP S/4HANA When a Service Call or Activity is Updated in SAP Field Service Management

4.10.1 Dispatch Plan and Release Activity

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 step, you assign the activity to a service technician and release the assignment.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|--|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The <i>Planning and Dispatching</i> screen is displayed. | |
| 2 | Find Service Call | In the Dispatching Board, search for the service call under Service call subject using the description you specified for the maintenance order. | The service call is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---------------------------|---|---|-----------------------|
| 3 | Assign Technician | <p>In the Dispatching Board there is a list of technicians with a specific skill set. (place the cursor on a technician name to see the skill set).</p> <p>Drag and drop the service call on to the appropriate technician based on the skill set required.</p> <p>Select today's date in the Planning Board if it's not already updated.</p> <p>Select all the assignments relevant to the service call and then assign the service call to the selected technician.</p> | The service call assigned to the technician is displayed in the Planning Board. | |
| 4 | Release assignment | On the Dispatching Board, select all the assignments and choose <i>Release Assignments</i> (in the top-right corner of the board). | The assignment is released and the technician is added as Executing Service Employee to the service item in the respective maintenance order. | |

4.10.2 Upload Attachment to a Service Call

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

You can to upload attachments to service calls. These attachments are replicated to maintenance orders on the SAP S/4HANA side.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|--|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Find Service Call | In the Dispatching Board, search for the service call under Service call subject using the description you specified for the service order. | The service call is displayed. | |
| 3 | Upload Attachment | On the service call detail page, upload an attachment under Attachments . | <p>The attachment is assigned to the service call and is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is assigned to the corresponding service order.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the role Maintenance Planner. Choose the <i>Find Maintenance Orders</i> application tile. Search for your maintenance order and select it <p>You find the attachment on the tab <i>Original Files</i>.</p> | |
| 4 | Delete Attachment | Choose the trash bin icon in the Hamburger menu to delete the attachment and trigger a deletion replication to SAP S/4HANA. | <p>The attachment is deleted in the service call and the deletion is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is deleted.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the role Maintenance Planner. Choose the <i>Find Maintenance Orders</i> application tile. Search for your maintenance order and select it <p>The attachment on the tab <i>Original Files</i> is not available anymore.</p> | |

4.10.3 Upload Attachment to an Activity

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

You can upload attachments to activities. These attachments are replicated to maintenance order items on the SAP S/4HANA side.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Find Activity | In the Dispatching Board, find the activity you have released by technician name. | The assigned activity is displayed under the specific technician in the Dispatching Board. | |
| 3 | Upload Attachment | On the activity detail page, find the area to upload an attachment. | <p>The attachment is assigned to the activity and is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is assigned to the corresponding service order.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the role <code>Maintenance Planner</code>. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|---|---|-----------------------|
| | | | <ul style="list-style-type: none"> Choose the <i>Find Maintenance Orders</i> application tile. Search for your maintenance order and select it. Select the Maintenance Order Operation in the <i>Operations</i> tab <p>You find the attachment on the tab <i>Original Files</i>.</p> | |
| 4 | Delete Attachment | Choose the trash bin icon in the Hamburger menu to delete the attachment and trigger the deletion replication to SAP S/4HANA. | <p>The attachment is deleted on the activity and the deletion is replicated to SAP S/4HANA.</p> <p>Check in SAP S/4HANA if the attachment is deleted.</p> <p>Check in SAP S/4HANA if the attachment is assigned to the corresponding service order.</p> <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the role <i>Maintenance Planner</i>. Choose the <i>Find Maintenance Orders</i> application tile. Search for your maintenance order and select it. Select the Maintenance Order Operation in the <i>Operations</i> tab <p>The attachment on the <i>Original Files</i> tab is not available anymore.</p> | |

4.11E2E Scenario: Create Maintenance Confirmations in SAP S/4HANA When Time Effort or Material Is Approved in SAP Field Service Management

4.11.1 Technician Starts Working on Activity

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 step, a technician starts working on the assigned activity.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|-----------------------|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Technician - Customer Service on a mobile device. | The message <i>Change company</i> is displayed. | |
| 2 | Choose company | Choose the company you belong to, for example <i>Company 3</i> . | The message <i>Company has never been synchronized</i> is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------|---|---|-----------------------|
| 3 | Sync | Choose <i>Sync</i> . | The screen showing all the assignments assigned to technician is displayed. | |
| 4 | Choose Activities | <ul style="list-style-type: none"> Choose the Hamburger menu icon in the top left of the screen; Select <i>Activities</i>. Choose the assigned activity from the list. | The screen showing <i>Service Call Description, Status, Customer, Address, Responsible, Reserved Material, and Assignment details</i> is displayed. | |
| 5 | Choose travel | Choose <i>Travel</i> at the bottom of the screen. | The screen Are you ready to start travelling is displayed. | |
| 6 | Start work | Choose <i>Work</i> at the bottom right. | The message I confirm is displayed. | |
| 7 | Confirm | Choose <i>Confirm</i> . | The screen showing all the service details is displayed. | |

4.11.2 Updates Time and Used Reserved Material

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 step, the technician updates the time, expenses, and reserved material used.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|-------------------------------------|---|--|-----------------------|
| 1 | Log on (Optional) | Log on to SAP Field Service Management as a Service Technician - Customer Service on a mobile device. | The message <i>Change company</i> is displayed. | |
| 2 | Sync (Optional) | Choose the company you belong to and then choose <i>Sync</i> . | The screen showing all the assignments of the technician is displayed. | |
| 3 | Choose Activities (Optional) | Choose the assigned activities from the list. | The screen showing <i>Service Call Description, Status, Customer, Address, Responsible, All Reserved Material, and Assignment Details</i> is displayed. | |
| 4 | Choose Reserved Material | Choose <i>Reserved materials > Use > Save</i> . | The reserved material is updated. This step is mandatory only when the service calls are derived from the maintenance orders that are created with components to be procured. | |
| 5 | Choose Create | Choose <i>Create</i> ('+') at the bottom of screen. | The screen showing <i>Attachment, Checklist Expense, Effort, Feedback Code, Follow Up Material, and Mileage</i> is displayed. | |
| 6 | Choose Effort | Choose <i>Effort</i> from the list. | The screen showing <i>New Effort</i> is displayed. | |
| 7 | Update Effort | Choose <i>Time Entry > Working time</i> . Update the working time. Choose <i>Effort Type</i> and then choose <i>Save</i> . | The time effort is updated. | |

4.11.3 Finish Work and Close Activity

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 step, the technician completes and confirms the activity.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--------------------------------------|---|---|-----------------------|
| 1 | Log on (Optional) | Log on to SAP Field Service Management as a Service Technician - Customer Service on a mobile device. | The message <i>Change company</i> is displayed. | |
| 2 | Sync (Optional) | Choose the company you belong to, then choose <i>Sync</i> . | The screen showing all the assignments of the technician is displayed. | |
| 3 | Choose Assignments (Optional) | Choose an assigned assignment from the list. | The screen showing <i>Service call description, Status, Customer, Address, Responsible, Reserved material, and Assignment</i> details is displayed. | |
| 4 | Checkout | Choose <i>Checkout</i> . Choose <i>Confirm – Efforts</i> . Choose <i>Save</i> . | The screen <i>Preview Report</i> is displayed. | |
| 5 | Choose Preview Report | Choose <i>Preview Report</i> – Choose <i>Sync</i> . | A service report is generated. | |
| 6 | Sign | Choose <i>CLICK TO SIGN HERE – Sign</i> and update your name. | The screen showing <i>Confirmed and closed</i> is displayed. | |
| 7 | Done | Choose <i>Done</i> . | The screen with the list of the activities is displayed. | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|------------------------|---|---|-----------------------|
| 8 | Activity Status | Choose the activity from the list of activities. Check the status of the activity. | The screen <i>Status – Closed</i> is displayed. | |

4.11.4 Manager Approves Time Effort and Material

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 step, the planner approves the time effort and reserved material used. A maintenance confirmation is automatically created in SAP S/4HANA once the planner approves the time and expenses in SAP Field Service Management.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|---|--|-----------------------|
| 1 | Log on | Log on to SAP Field Service Management as a Service Planner/Dispatcher. | The screen <i>Planning and Dispatching</i> is displayed. | |
| 2 | Navigate to Time and Expenses | Choose <i>Time and Material Journal</i> . | The screen showing <i>Time effort, Expense, Material, Mileage,</i> and <i>Overview</i> is displayed. | |
| 3 | Approve Time Effort | Choose <i>Time Effort</i> at the top of the board. Choose your service call using the description from the list of service calls and choose <i>Approve</i> . | The time effort added by the technician is approved. Once the time effort is approved in SAP Field Service Management, a confirmation for the service order is created automatically. | |
| 4 | Approve Expense | Choose <i>Expense</i> at the top of the board. Choose your service call using the description from the list of service calls and choose <i>Approve</i> . | The expense added by the technician is approved. Once the expenses are approved in SAP Field Service Management, a confirmation for the service order is created automatically. | |
| 5 | Approve Material | Choose <i>Material</i> at the top of the board. Choose your service call using the description from the list of service calls and choose <i>Approve</i> . | The material added by the technician is approved. Once the material is approved in SAP Field Service Management, a confirmation for the service order is created automatically. | |
| 6 | Log On | Log on to the SAP Fiori launchpad as a Maintenance Planner.. | The SAP Fiori launchpad is displayed. | |
| 7 | Start Search | Choose <i>Search</i> in the upper right area of the launchpad. | An input field is displayed. | |
| 8 | Search Criteria | Choose dropdown list as: <i>Maintenance Order Confirmations</i> and input <i>Maintenance Order Number</i> from previous section. | All the confirmations created for the maintenance order will be displayed | |
| 9 | View Single Confirmation Number | Choose hyper link <i>2XXXXXX (X) Maintenance Order Confirmations</i> . | The <i>Maintenance Order Confirmations: 2XXXXXX (1)</i> screen is displayed. | |

4.12 E2E Scenario: Technically Complete a Maintenance Order in SAP S/4HANA

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

Once a maintenance order is technically completed the corresponding service call is automatically changed to Technically Complete in SAP Field Service Management.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|--|--|---|-----------------------|
| 1 | Log On | Log on to SAP Fiori launchpad using the role Customer Service Manager. | SAP Fiori Launchpad with an access to the <i>Manage Service Order</i> application is displayed. | |
| 2 | Open Find Maintenance Order application | Choose the <i>Find Maintenance Order</i> application tile. | The <i>Maintenance Order</i> screen displays. | |
| 3 | Find Maintenance Order | In the search area at the top, enter <your description> in the filter <i>Description</i> or enter the ID of your maintenance order in the search field. Choose <i>Go</i> . | Your maintenance order is displayed in the report list within <i>Find Maintenance Orders</i> . | |

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
|-------------|---|---|--|-----------------------|
| 4 | Navigate to Change Maintenance Order | Choose <i>Related Apps</i> at the upper right corner of the screen, and choose <i>Change Maintenance Order</i> . | | |
| 5 | Set Complete (Technically) Status | Choose <i>Set System Status</i> , select <i>Complete (Technically)</i> . | The <i>Complete (Technically)</i> screen displays. | |
| 6 | Reference Data | Make the following entries: <i>Reference Date: <Date></i> <i>Reference Time: <Time></i> <i>Complete Assigned Notifications: flag set</i> Choose <i>OK</i> | The <i>Complete (Technically)</i> status for the maintenance order is done. | |
| 7 | Check Service Call | Check if the service call status is technically complete. | Once the maintenance order is <i>Complete (Technically)</i> in SAP S/4HANA, the corresponding service call in SAP Field Service Management is set to <i>Technically Complete</i> . | |

5 Appendix

Typographic Conventions

| Type Style | Description |
|----------------|--|
| <i>Example</i> | 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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