

Service Order Processing with SAP Field Service Management

Table of Contents

1	Purpose	3
2	Prerequisites	4
2.1	System Access	4
2.2	Roles	4
2.3	Master Data, Organizational Data, and Other Data	5
2.3.1	Field Mapping Between SAP S/4HANA and SAP Field Service Management	5
2.3.2	Priority Value Mapping	6
2.3.3	SAP Field Service Management Mobile Application	7
2.4	Preliminary Steps	7
3	Overview Table	8
4	Test Procedures	9
4.1	E2E Scenario: Create a Service Order in SAP S/4HANA and Release It to SAP Field Service Management	9
4.1.1	Create a Service Order with Line Items	9
4.1.2	Release a Service Order	11
4.2	E2E Scenario: Update a Released Service Order in SAP S/4HANA and Re-release It	13
4.2.1	Update a Service Order with Line Items	13
4.3	E2E Scenario: Update a Service Order in SAP S/4HANA When a Service Call or Activity is Updated in SAP Field Service Management	15
4.3.1	Dispatch Plan and Release Activity	15
4.3.2	Reassign Service Technician and Release Activity (Optional)	17

4.3.3	Duplicate, Release, and Cancel Activity (Optional)	18
4.3.4	Upload Attachment to a Service Call	20
4.3.5	Upload Attachment to an Activity	21
4.4	E2E Scenario: Create Service Order with Items in SAP S/4HANA When Service Call or Activity Is Created in SAP SAP Field Service Management	23
4.4.1	Create Service Call	23
4.4.2	Create Activity	26
4.5	E2E Scenario: Create a Completed Service Confirmation in SAP S/4HANA When Time Effort, Expense, or Material Is Approved in SAP Field Service Management	29
4.5.1	Technician Starts Working on Activity	29
4.5.2	Updates Time, Used Reserved Material, and Add Expenses	30
4.5.3	Finish Work and Close Activity	32
4.5.4	Manager Approves Time Effort/Expense and Material	34
4.6	E2E Scenario: Complete a Service Order in SAP S/4HANA	36
5	Appendix	38

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.

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.

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_CUSTOMER_SRVC_MANAGER	Service Management	SAP_BR_CUSTOMER_SRVC_MGR	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:

Service Order Processing with
SAP Field Service Management

Prerequisites

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
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

Service Product Item in SAP S/4HANA	Activity in SAP Field Service Management
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

Service Order Processing with
SAP Field Service Management

Prerequisites

Priority in SAP S/4HANA	Priority in SAP Field Service Management
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.

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

4.1.1 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> • <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>	A new service order has been created. The edit view of the service order will be opened.	
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 <i>Enter</i>.</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>	A service order including an item has been created.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
		<p>Make sure that the service order is in status Open.</p> <p>Choose Save.</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>		

4.1.2 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.	
3	Find Service Order	In the search area on the top, enter <your description> in the filter Description or enter the ID of your service order in the Search field. Choose Go .	Your service order is displayed in the list report within Manage Service Orders .	
4	Open Service Order in the Edit mode	Choose Edit for your service order in the list.	The Edit view of the service order opens.	
5	Release Service Order	In the tab area Service Order Details , change the Status from Open to Released Choose Save .	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 Transaction History . The IDs of the activities in SAP Field Service Management are visible in the service order items, tab Transaction History .	

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

4.2.1 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 Search Service Order application is displayed.	
2	Open the Search Service Order application	<ul style="list-style-type: none">Choose the Search Service Order application tile.Search for your service order and select it.	The Search Service Order app opens.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
		<ul style="list-style-type: none"> Choose <i>Edit</i>. 		
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>Edit an item of category service part and change the quantity.</p> <p>Go back to <i>Service Order Details</i>.</p> <p>Choose <i>Save</i> to save the service order.</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 IDs of the activities in SAP Field Service Management are visible in the service order items, tab <i>Transaction History</i>.</p>	<p>The changed properties are visible in SAP Field Service Management, the integration flow processing is successful.</p>

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

4.3.1 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.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
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 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.</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 service order.	
5	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.	
6	Open the Search Service Order application	<p>Choose the <i>Search Service Order</i> application tile.</p> <p>Search for your service order and open it.</p> <p>Check that the following fields are filled correctly:</p> <ul style="list-style-type: none"> ▪ Executing Service Employee 	The <i>Search Service Order</i> app opens.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
		<ul style="list-style-type: none"> ▪ Planned Date from ▪ Planned Date to <p>Check for both Items that you are not able to change the following fields via the UI:</p> <ul style="list-style-type: none"> ▪ Executing Service Employee (change or add) ▪ Planned Date from ▪ Planned Date to <p>Check for both Items that the Execution Status is correct. "In Planning" for items successfully replicated to SAP Field Service Management. "In Execution" for items successfully released to a technician in SAP Field Service Management.</p>		

4.3.2 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 activity is assigned to the other technician.	
4	Release Assignment	Select the reassigned activity and choose <i>Release Assignments</i> (in the top-right corner of the board).	The assignment is released.	

4.3.3 Duplicate, Release, and Cancel 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 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> .	
5	Cancel Activity	In the Dispatching Board, find the activity duplicated in the previous step and click it. In the popup, click on the 3-dot menu, then choose "cancel".	In S/4HANA, search for your Service Order. Check for the cancelled Item that the Execution Status is "Cancelled" and the Life-Cycle Status is "Completed". Check that the cancelled Item has the correct Rejection Reason Assigned by the System (Internal).	

4.3.4 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.	The attachment is assigned to the service call and is replicated to SAP S/4HANA. Check in SAP S/4HANA if the attachment is assigned to the corresponding service order.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
			<ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the 210le Customer Service Manager. Choose the Search Service Order application tile. Search for your service order and select it You find the attachment on the tab Attachments .	
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.	The attachment is deleted in the service call and the deletion is replicated to SAP S/4HANA. Check in SAP S/4HANA if the attachment is deleted. <ul style="list-style-type: none"> Log on to SAP Fiori launchpad using the 210le Customer Service Manager. Choose the Search Service Order application tile. Search for your service order and select it The attachment on the tab Attachment is not available anymore.	

4.3.5 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.	
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 220le 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 corresponding service order item on the <i>Attachments</i> 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 220le 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 <i>Attachments</i> tab is not available anymore.	

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

4.4.1 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 <i>Service Calls</i> view c. Press the <i>Create</i> button in the bottom-right corner.			
2	Create a New Service Call	a. a.Enter values for the following fields of the service call. - <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> b. Choose the ✓ icon to save the service call.			
3	Check the Result in SAP Cloud Integration Monitoring	a. Log on to SAP Cloud Integration. b. You should see a message for the 'Replicate Service Call from SAP Field Service Management to SAP S4HANA' c. Make sure that the message is in status Completed.		The message reaches SAP S/4HANA successfully.	

Test Step #	Test Step Name	Instruction	User Entries: Field Name: Value	Expected Result	Pass / Fail / Comment
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>e. Check that the sold-to party is correct.</p> <p>f. Check that the description is correct.</p> <p>g. Check that the contact is correct.</p> <p>h. Check that the priority is correct (see section 2.3.2 for mapping details).</p> <p>i. Check that requested start is correct (earliest start date/time).</p> <p>j. Check that requested end is correct (due date/time).</p> <p>k. Check that the status is set to Open.</p> <p>Go to the <i>Parties Involved</i> section.</p> <p>l. Check that the employee responsible is correct.</p> <p>Go to the <i>Reference Objects</i> section.</p> <p>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.</p> <p>n. Check that the service call entry has the correct code assigned.</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
		Go to Notes 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.			
5	Check Result in SAP Field Service Management	a. Log on to the SAP Field Service Management. b. Open the Service Calls 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).			

4.4.2 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.
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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	<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. Check that your service order has no errors and is now in status Released.</p> <p>e. Check that your service order item was created with status Released.</p> <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>			

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

4.5.1 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 <code>I confirm</code> is displayed.	
7	Confirm	Choose <i>Confirm</i> .	The screen showing all the service details is displayed.	

4.5.2 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, and 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, and 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.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
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, and 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. Choose <i>Effort Type</i> and then choose <i>Save</i> .	The time effort is updated.	
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 and 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.	

4.5.3 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.
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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.	

4.5.4 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</i> , and <i>Overview</i> is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
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 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 <your description> 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.	

4.6 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 <your description> 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> .	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail / Comment
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> .	

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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