XRM Supplier quick guide
Submit Milestones and Expenses

Topic:

This guide aims to give quick step by step instructions to Submitting Billable Milestones and Expenses to an existing Statement of Work in XRM Fieldglass

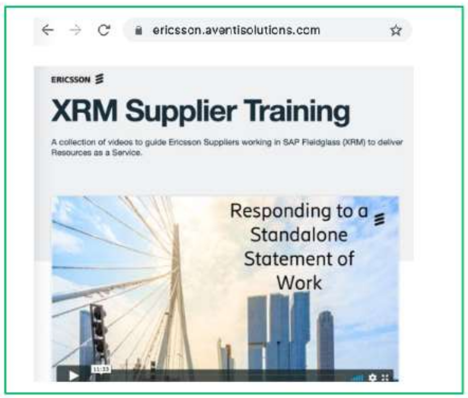
This guide is applicable to all SOW categories except Resources as a Service (RaaS)!

Organization 2023-02-24

Available Training Material & User Guides

How-To Videos

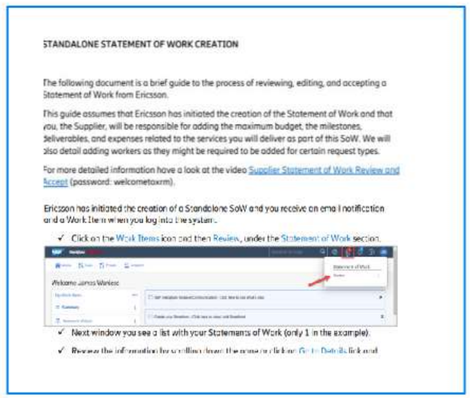
Self-learning videos



The password to the how-to videos page is: welcometoxrm

Full User Guides

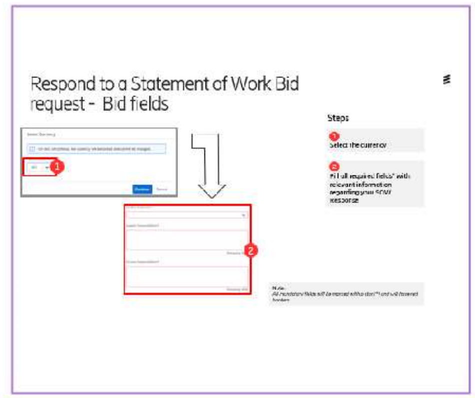
Comprehensive user guides with full instructions on "how-to"



Located at the SAP Fieldglass Reference Library

Quick Guides

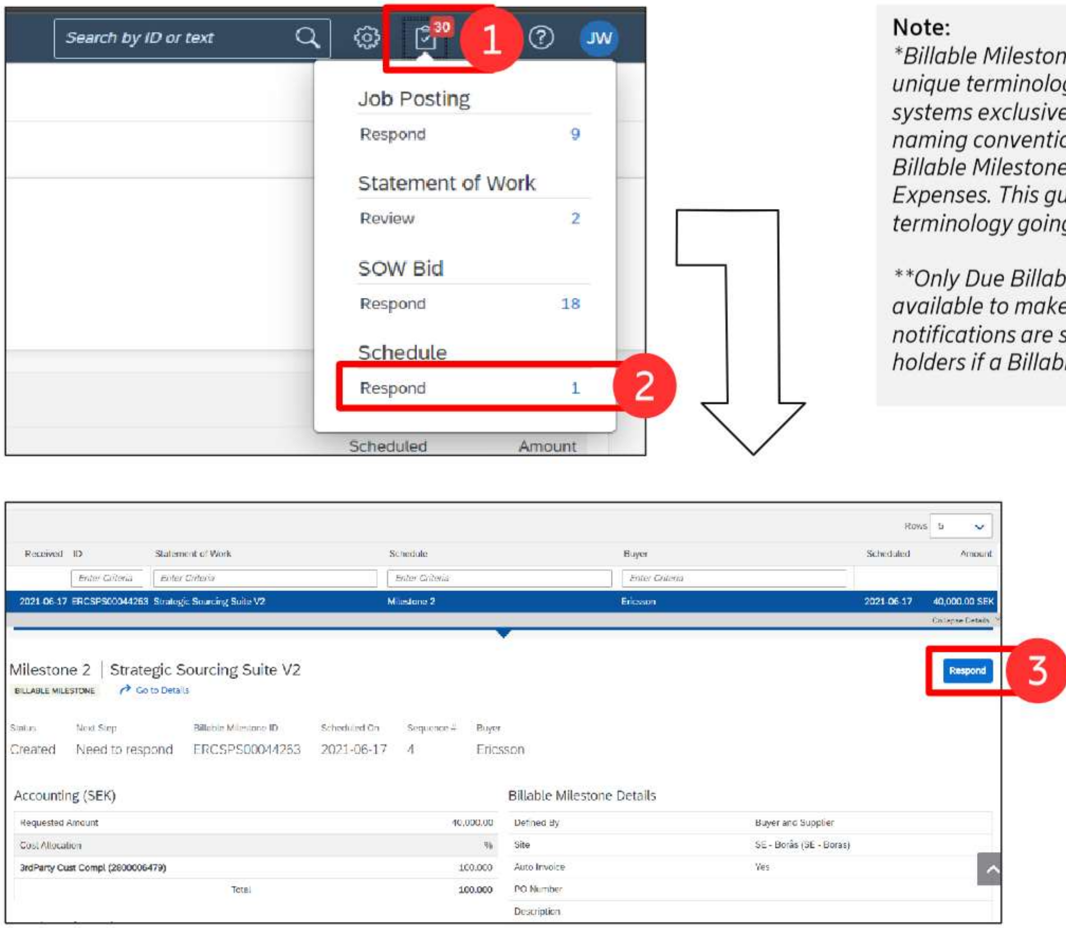
Shortened version of the comprehensive user guides



Located at the SAP Fieldglass Reference Library

XRM Training Materials are continuously updated

Respond to a due Billable Milestone



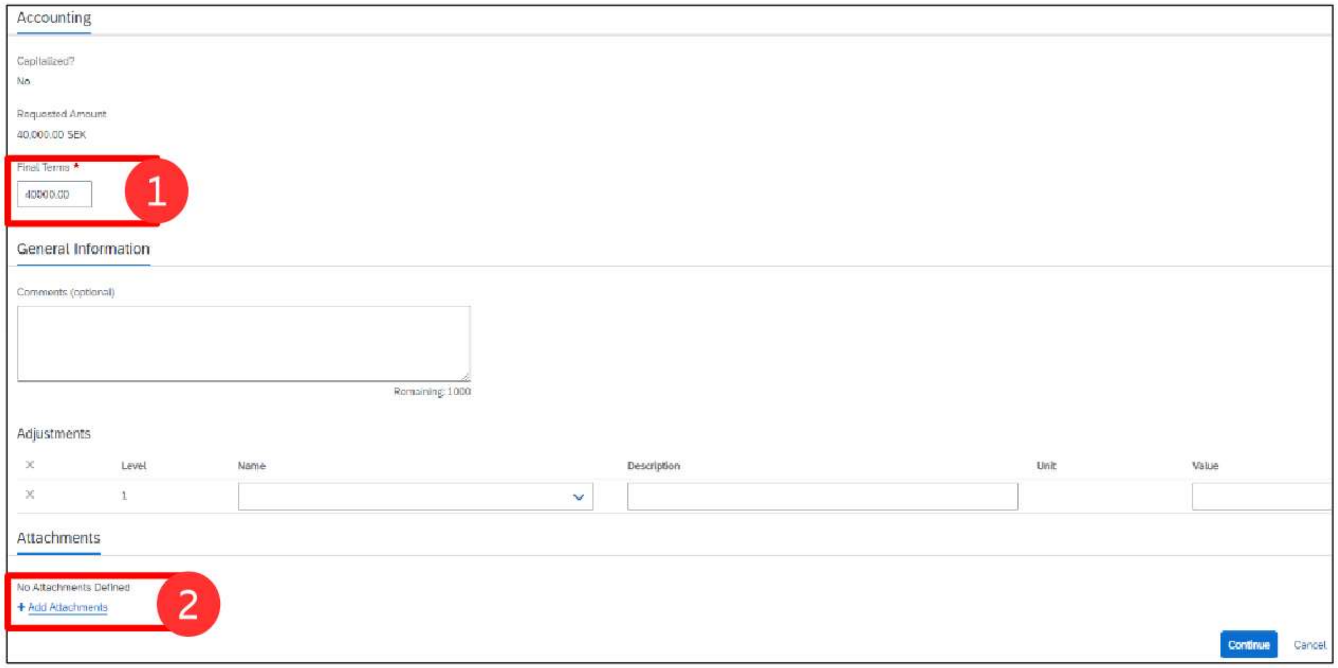
Note:
**Billable Milestones and Expenses is a unique terminology used in Ericsson systems exclusively. The native Fieldglass naming convention is Schedules for Billable Milestones and Events for Expenses. This guide will use the Ericsson terminology going forward!*

***Only Due Billable Milestones will be available to make a response to. Email notifications are sent to the account holders if a Billable Milestone is due.*

Steps

1. Click on your work items list
2. Click on Respond** under the Schedule* category
3. Click on Respond after selecting the Billable Milestone you would like to respond to

Respond to a Billable Milestone – 1



Steps

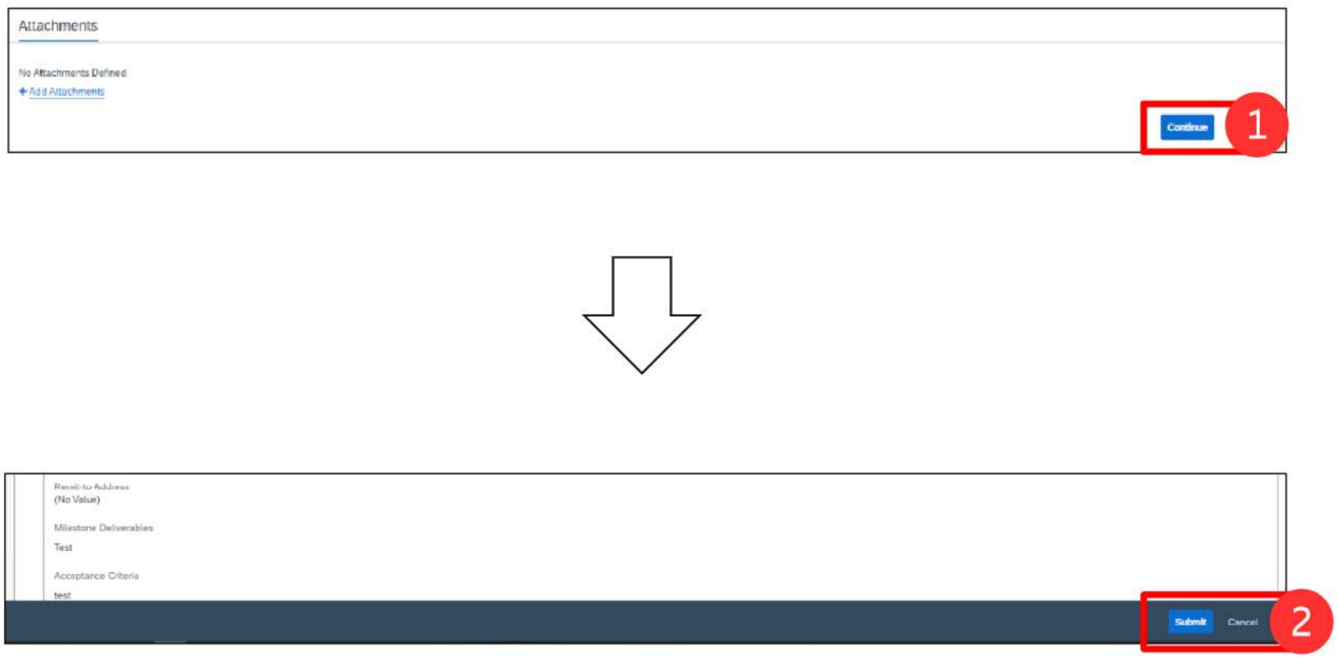
1. Scroll down and add the Final terms* to the Billable Milestone

   Ensure Auto-Invoice is set to 'Yes'

2. Add any attachments as required to justify the amount submitted

Note:
*The Final Terms submitted by a Supplier can be higher or lower than the previously forecasted amount agreed. Submitting a higher-than-expected amount is not blocked by XRM, however if the Budget of the SOW has run out the SOW Owner will not be able to approve the item. In such cases a Revision needs to be initiated by the SOW Owner and accepted by the Supplier before the item can be approved. This ensures additional budget is added to the Purchase Order.

Respond to a Billable Milestone – 2

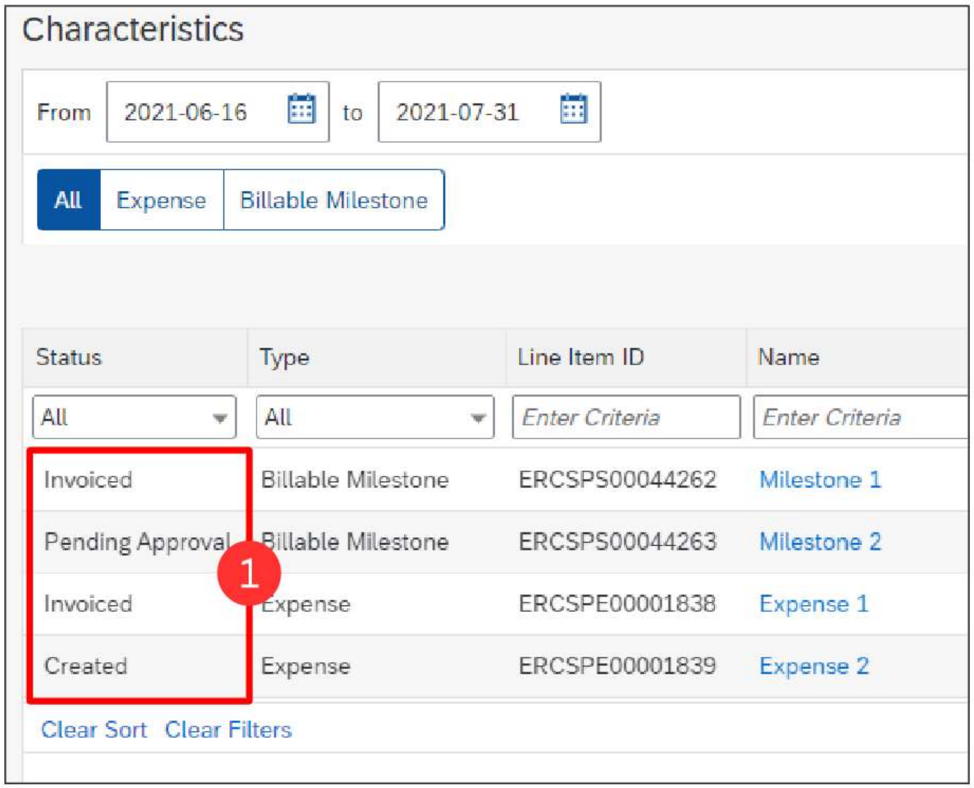


Steps

1. Click Continue on the bottom of the page

2. Click Submit on the Review page

Respond to a Billable Milestone – Statuses



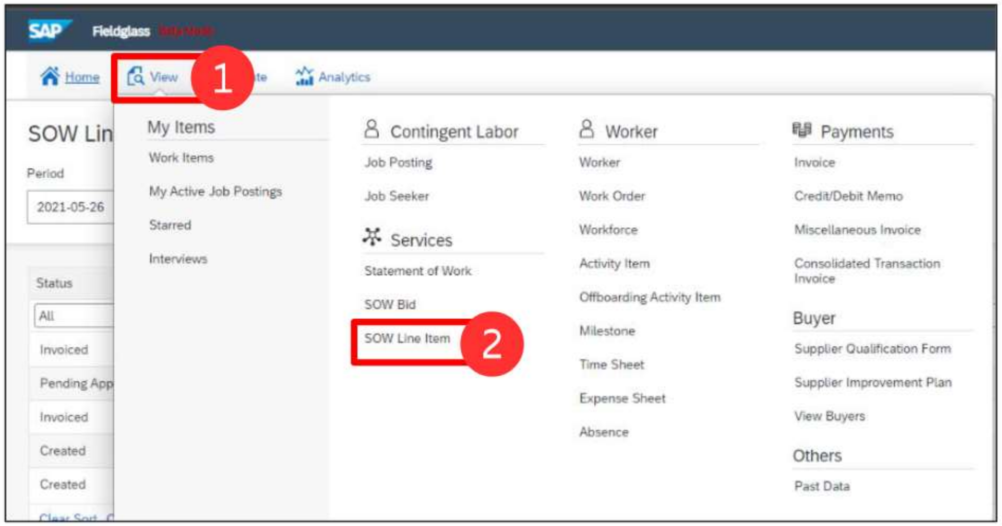
Steps

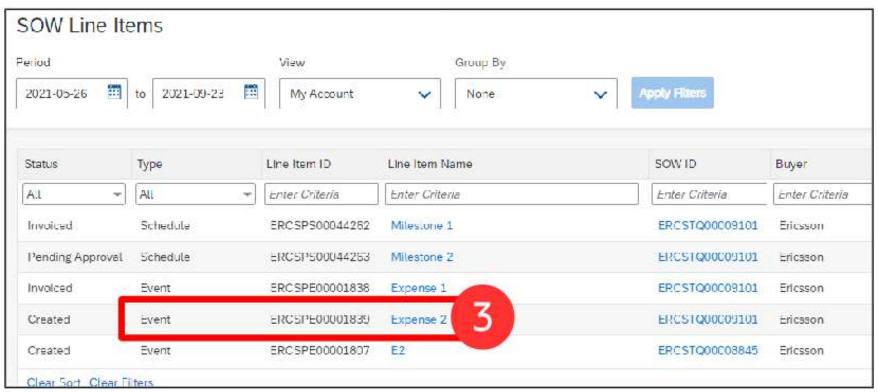
1
View the status* of the Submitted item in the Characteristics page in the Statement of Work

Note:
**There are four possible statuses for each SOW Line item:*

Created – The SOW Line item is created and is waiting for the Due Date to pass. If the Due Date has passed, the item is ready to be posted.
Pending Approval – The SOW Line item has been submitted for the SOW Owner for review and is now pending approval with the SOW Owner.
Invoiced – The SOW Line item has been approved by the SOW Owner and the Goods Receipt is generated within 24 hours of approval again the Purchase order. After 24 hours, the supplier invoice can be submitted to Ericsson.
Rejected – The SOW line item has been rejected by the SOW Owner and is waiting for the Supplier to be corrected and resubmitted

Submit an Expense





Steps

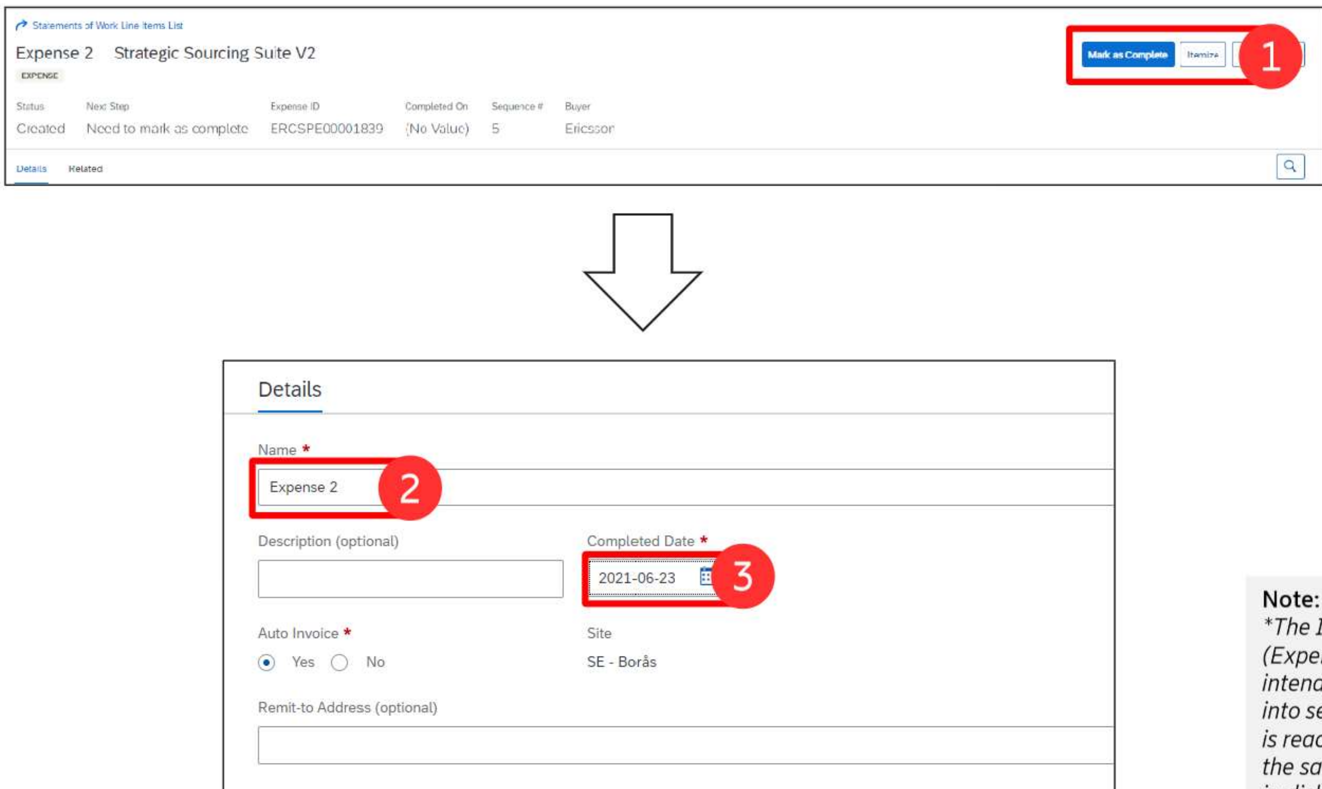
1
Click on View*

2
Select the SOW Line Item Category

3
Click on the name of the Expense you would like to submit

Note:
**Alternatively, the specific SOW related line items can be reached by navigating to the Statement of Work and clicking on the Characteristics tab*

Submit an Expense– 2

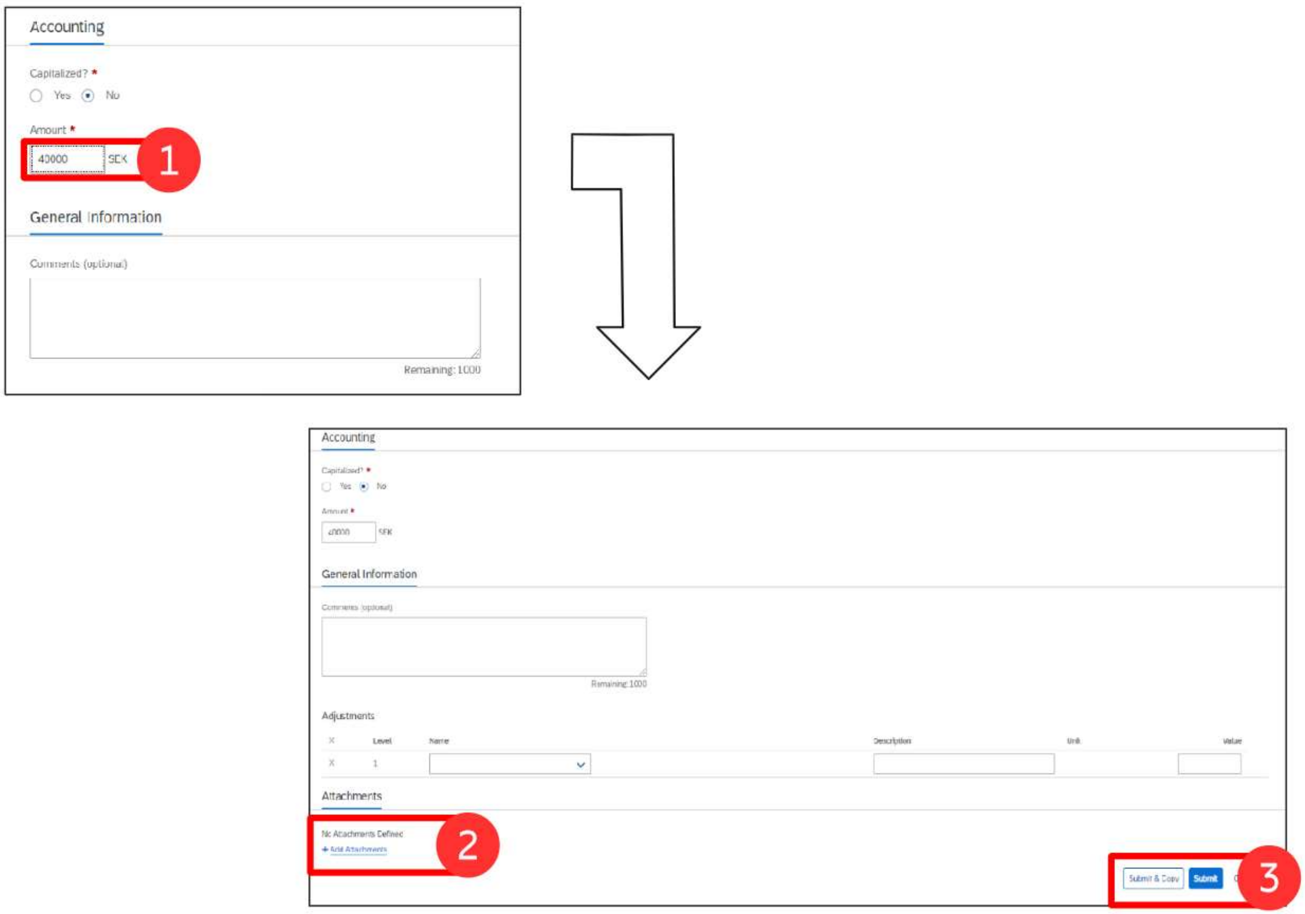


Steps

1. Click Mark as Complete or Itemize* to submit an Expense
2. Enter a descriptive name for the Expense
3. Choose the completed date for the Expense item

Note:
**The Itemize function will create a new separate line item (Expense) based on the originally created item. This intends to let the supplier break up the Expense budget into separate pieces until the original Expense budget cap is reached. The process of itemizing the expense will be the same as the Mark as Complete option once the button is clicked.*

Submit an Expense– 2



Steps

1. Enter the Amount for the Expense

2. Add any attachments if required to justify the expenses

3. Click Submit to send the expense item to the SOW Owner for approval

How to get support – Suppliers

For SAP Fieldglass support please use stepwise Support channels as described below

1) CREATE A TICKET

Do you need support with SAP Fieldglass (XRM) click on the link to create a support request;

SAP Fieldglass (XRM) - webform for inquiries - Ericsson

2) CALL US

For Invoice related matters call us:

External phone numbers

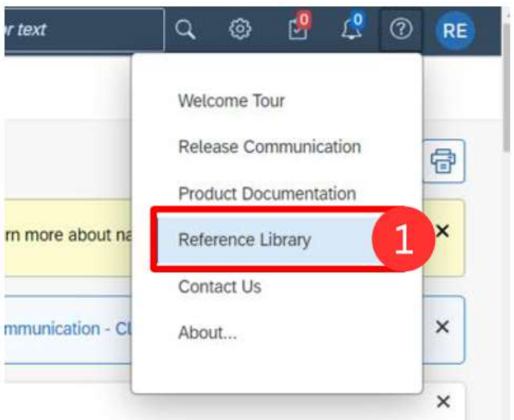
(Select your country to find the contact information)

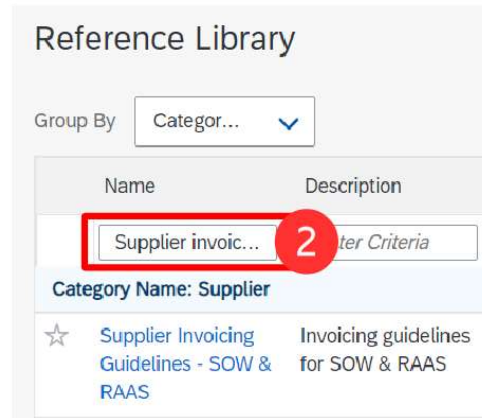
3) ESCALATION CHANNEL

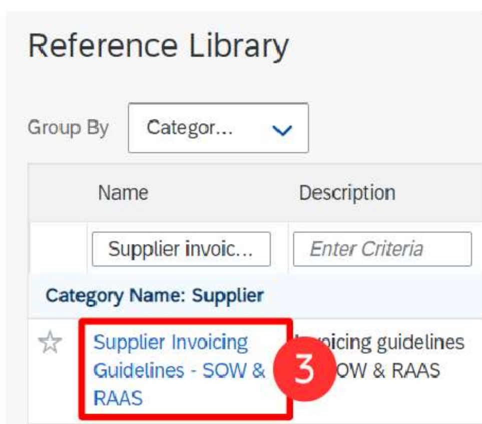
For urgent matters use below link if no resolution on support ticket created;

PTP Incident Management Team

Invoicing Guidelines







1 Click on the Reference Library

2 Search for Supplier Invoicing

3 Open Supplier Invoicing Guidelines – SOW & RAAS