

Feature Behavior:

When you enable merging of multiple services into a single project functionality:

- Workday merges services with the same project hierarchy into a single project downstream, even if they have different billing models.
- When there are no common project hierarchies across services in a quote, Workday creates individual projects for each.
- Workday validates that the **Rate Type** (Hours vs. Days) matches across all merged services. When the **Rate Type** is *Days*, the merged services must use the same **Project Billing Rate Sheet**.
- **Note:** The downstream behavior of how services are converted into a project is determined by the **Manage Multiple Services as a Single ~Project~** flag setting at the time of quote creation. When you change the tenant setting on the **Maintain Services CPQ Settings** task, it will only impact the newly created quotes. Existing quotes will retain the behavior from the flag setting during the quote creation.

Downstream Impact on Projects:

When the Primary quote status changes to Approved, Workday creates an Opportunity Project. In the opportunity project:

- Opportunity Project Name = (Quote Name) + (Project Hierarchy).
- If merged services is not turned on the Service Name = Project Name
- Opportunity Project Description = Comma separated list of the service names in that project along with their descriptions.
- The **Start Date** of the project is the same as the earliest date of the merged services and the **End Date** of the project is the same as the latest date of the services (if merged).
- All role lines of the merged services convert to individual resource plan lines in the project.
- The resource forecast reflects all role lines of the merged services.
- The **Probability of Success** report field derives the value from an open and active opportunity from a quote.

Downstream Impact on Contracts:

When the opportunity status changes to Closed/Won, Workday creates a customer contract.

- The contract **Effective Date** is the same as the **Project Start Date**.
- All role lines/RPLs of merged services with the same **Billing Model** type (*Fixed Fee or Time and Expense*) convert to a single contract line for labor.
- All expense lines of merged services with the same **Billing Model** type convert to a single contract line for expense.
- All third party lines of merged services with the same **Billing Model** type convert to a single contract line.
- The item and discount lines for each service do not merge to a single contract line and display as separate lines.

- When the merged services have different billing methods, Workday continues to merge them into a single project but creates separate contract lines for each billing method.
- Contract Line Date consideration:

For	From Date	To Date
Role, Third Party and Expense Lines	= Project Start Date	= Project End Date
Non-Recurring Item Lines	= Item Start Date	= Service End Date
Recurring Items	= Service Start Date	= Service End Date
Discount Lines	= Service Start Date	= Service End Date