Service Note Inbox

Module Guide: Service Note Inbox

Module Location

CRM > Service Note > Service Note Inbox

Module Objective

The **Service Note Inbox** module functions as the approval center for all **Service Recording** documents that have been submitted. This module is used by superiors or managers who are authorized to review and provide approval for service records created by the customer service or technical teams.

1. Main View (Service Note List)

The main page of this module is an "inbox" that displays all service notes requiring your action.

View Explanation

This page provides a summary of all service notes that are awaiting approval.

- **Filters**: You can search for a specific service note by **Service Note Number** or a **Date From** and **Date To** range. You can also filter by **Document Filter Status** and **Approval Filter Status**.

- **Request List**: The table below will display all service notes awaiting action. The table currently shows "...No Record...".

Column Explanation

- **Service Note Number**: The unique number of the submitted Service Recording document.
- **Start Date**: The date the service was started or recorded.
- **Customer**: The name of the customer associated with the service.
- **Status**: An icon indicating the current status of the document.
- **Approval**: An icon indicating the status of the approval process.
- **Approved date**: The date when the approval was given.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Service Note Inbox** module to see the list of service notes that require approval.

Step 2: Review the Service Note Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the customer's complaint, the items received, and the service to be provided.

Step 3: Provide Approval

After you open and review the service note details in Step 2, you will find the buttons to grant approval (e.g., **"Approve"** or **"Reject"** buttons) **within that detail page**. Click the appropriate button to complete the review process.

3. Workflow & Integrated Business Process

This module is part of a structured service process workflow.

1. **Submission**: A user (e.g., customer service staff) creates an entry in the **Service Recording** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed service note automatically enters the queue in this **Service Note Inbox** module.
3. **Review & Approval**: The manager or approver opens this module, selects the service note to be reviewed, opens it, and then provides approval from within the detail page.
4. **Status Update**: After approval, the status on the original document is updated, and the service process can continue.

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