Service Sheet Inbox

Module Guide: Service Sheet Inbox

Module Location

CRM > Service Recording > Service Sheet Inbox

Module Objective

The **Service Sheet Inbox** module functions as the approval center for all **Service Sheets** that have been completed and submitted by the technical team. This module is used by a superior or service manager to review and validate the work that has been done before the service is considered officially complete and, if necessary, proceeds to the billing process.

1. Main View (Service Sheet List)

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



View Explanation

This page provides a summary of all Service Sheets that are awaiting approval.

- **Filters**: You can search for a specific service sheet by **Service Sheet 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 sheets awaiting action. The table currently shows "...No Record...".

Column Explanation

- **Service Sheet Number**: The unique number of the submitted Service Sheet document.
- **Service Note Number**: The reference number from the initial Service Recording.
- **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 Sheet Inbox** module to see the list of completed service jobs that require approval.

Step 2: Review the Service Sheet 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 by the technical team, such as work notes, time spent, or spare parts

used.

Step 3: Provide Approval

After you open and review the Service Sheet 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 the final stage in the structured service process workflow.

1. A **Service Note** (Service Recording) is created to record the request.
2. A **Service Sheet** is created by the technical team to document the completed work, and then it is **Confirmed**.
3. The confirmed Service Sheet automatically enters the queue in this **Service Sheet Inbox** module.
4. The service manager reviews and gives final approval.
5. After approval, the service cycle is considered complete and can be forwarded to the **Finance team for billing** if the service is chargeable.

Tips & Important Notes

- This module is the **final control point** in the service workflow to ensure all work reported by the technical team is valid and appropriate.

- Approval in this module often **triggers the billing process** to the customer.
- Use the status filters to easily see all Service Sheets that are still awaiting your approval.

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