

CREATE MANUAL SERVICE SHEET

QUICK REFERENCE GUIDE



Step by step

To Create Manual Service Sheet:

Step Action

Create Manual Service Sheet	
1.	Click on the Workbench tab
2.	Click on the Orders tile
3.	Click the PO number
4.	Select the line you want to invoice against
5.	Click Create Service Sheet
6.	Input the Service Sheet number , must be unique Note: Start the Service Sheet number with 'SS' to help identify it in your documents area.
7.	The Service Sheet Date will default to today's date
8.	Input Service Description
9.	Select the Service start date and Service end date Note: You can use the tick-box to copy the start and end dates to the line
10.	The below steps are optional fields : i) Select the 'Tick Box' to copy the service start and end dates to the service line items ii) Scroll down and click Add Comments and/or Add Attachments Note: You can only add attachments to service sheets at the header level.
11.	Scroll down to the Service Entry Sheet Lines i) Select the line you want to enter the service details against ii) Click Add
12.	Select Unplanned item Note: If you have access, you can add items from your customer's catalogue
13.	Enter Purchase Order number/Line Item in Part Number field (upper box)
14.	Enter Service Period and Description of Service in the Description field (lower box)
15.	Select either Service or Material
16.	Input Quantity Note: It is recommended to always use a quantity of 1
17.	Input Unit of measure as EA (each) Note: This must be entered in CAPITALS. Use the search feature, if entered incorrectly you do not get an error message, but it will be rejected later in the process.
18.	Input Unit Price Note: leave the subtotal blank, this will populate automatically when you click Update.
19.	Input the service period start date and end date Note: If the tick-box was selected when adding the service dates to the Service Sheet Header, these dates will be pulled through. You can overwrite the date if necessary.

Step Action

20.	(Optional) Add comments for the line Note: If you click Update you can see any missing fields still required or any errors needing correction.
21.	Click Next
22.	Review and click Submit Note: You can click Previous to go back, click Save to return to the Service Sheet later, or click Exit to save or delete the Service Sheet and leave
23.	Receive confirmation and exit: <ul style="list-style-type: none"> i) The screen states that your Service Sheet has been submitted. ii) (Optional) Click Print to print a copy iii) Click Exit <p>Note: The requisitioner will receive a system generated notification that there is a Service Sheet to approve</p>

Service Sheet rejection/approval

24.	Receive notification that a service sheets has been approved/reject/created:						
25.	Review approval outcome of service sheet <ul style="list-style-type: none"> i) Log on to Ariba Network Suppliers ii) Click on Workbench iii) Search for the relevant service sheet using the Service Sheet tile and relevant filter options iv) Look in the status column to see if it has been approved or rejected <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="color: red;">I F ...</th> <th style="color: red;">T H E N</th> </tr> </thead> <tbody> <tr> <td>The service sheet has been approved you can now invoice...</td> <td>Go to SOP: Create Invoice</td> </tr> <tr> <td>The service sheet has been rejected...</td> <td>Go to step 26</td> </tr> </tbody> </table>	I F ...	T H E N	The service sheet has been approved you can now invoice...	Go to SOP: Create Invoice	The service sheet has been rejected...	Go to step 26
I F ...	T H E N						
The service sheet has been approved you can now invoice...	Go to SOP: Create Invoice						
The service sheet has been rejected...	Go to step 26						
26.	Edit and resubmit service sheet <ul style="list-style-type: none"> i) Click on the blue service number of the service sheet that you want to edit ii) Review the rejection reason iii) Click Edit & Resubmit button iv) Amend the relevant fields v) Click Update vi) Click Next vii) Click Submit <p>Note: You can click Previous to go back, click Save to return to the Service Sheet later, or click Exit to save or delete the Service Sheet and leave</p> <p>Go to step 25</p>						

END

What now?

You can view the Service Sheet via **Fulfillment** and **Service Sheets** or under **Related Documents** when viewing the associated purchase order.

The status of a service line in a purchase order is set to **Serviced** once you create service sheets against it up to the subtotal amount.

You can continue to submit service sheets until the maximum value of the order is reached.

If you need to cancel the service entry sheet, if there is no cancel button, you will have to contact your customer and request they manually reject the service sheet. Once rejected, you can edit and resubmit.

Related information

- [Create Invoice for Goods and Services](#)