How to Create a Service Confirmation: Indirect-Limit Line

Find and View your Purchase Order

Select Your Purchase Order → **Create Your Service Confirmation** → **ERS Automates Invoice Creation**


1 Once you access the Supplier Profile page, click on the grid-shaped (Rubik's cube) icon i.e., the **'App Launcher' in the upper right-hand corner** to view Purchase Orders, Invoices, Supplier Profile etc. and navigate based on your preference.

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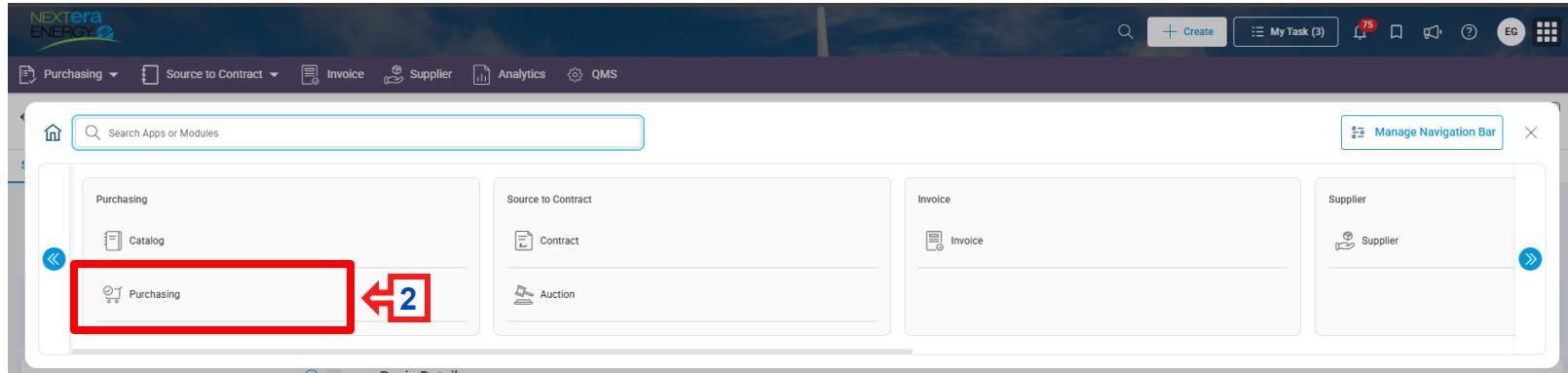
2 Then, select **'Purchasing'** from the menu. This will direct you to the Purchasing Section.

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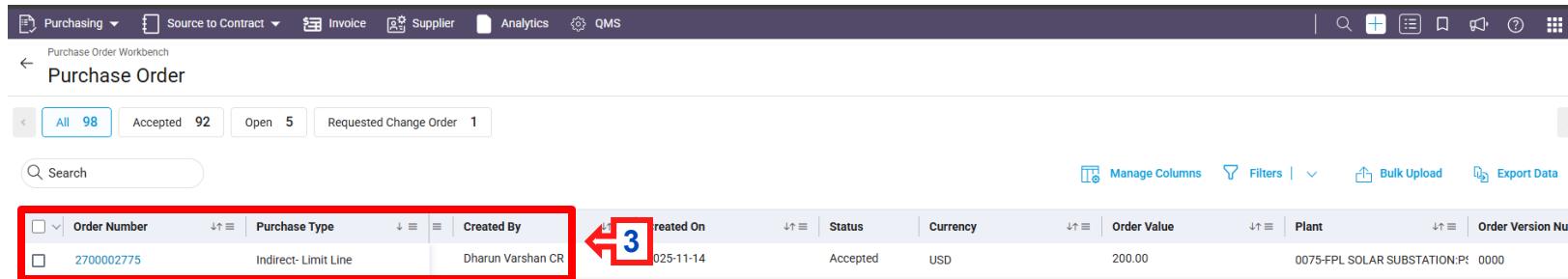
3 Click on the specific **'Purchase Order number'** to view its particulars.

Also, make sure to note the **Purchase Type.**

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4 In this Service PO, the **'Basic Details'** section shows that the supplier is ERS-enabled, as indicated by the ERS Flag.

Since the **'ERS flag is enabled'**, invoices will be **'Auto-generated'** following approval of the completed Service Confirmation.

If the ERS flag is not enabled, you'll have to create an E-invoice for your Purchase Orders.

5 Under **'Basic Details,'** the **'PO Header Text'** will include the name of the **'Vendor Confirmation Approver'**.

Note: If the Vendor Confirmation Approver cannot be found in the PO header text, please reach out to the order contact who created the PO

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6 Click **'Create Service Confirmation'** to proceed.

7 A confirmation prompt will appear on screen. Click **'Yes'** button to flip the lines into a service confirmation.
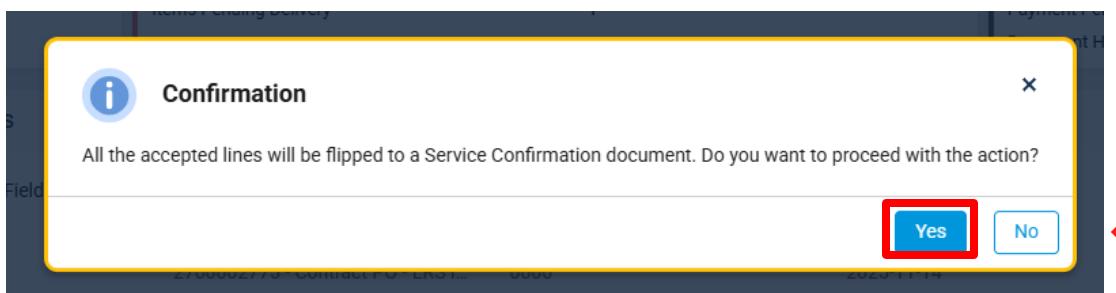
Flip Lines to Service Confirmation

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8 — Focusing initially on the Basic Details area of the service confirmation, specify the **Supplier Reference Number** and **Vendor Confirmation Approver.**

9 — In the Line Details area, click the **Add Sublines** icon.

Tip: Validate that the Price Basis is 'Amount Based'. If it is 'Rate Based', notify the PO Author to make the correction before proceeding with the service confirmation.

Service Confirmation Inputs - Supplier

Select Your Purchase Order → **Create Your Service Confirmation** → ERS Automates Invoice Creation
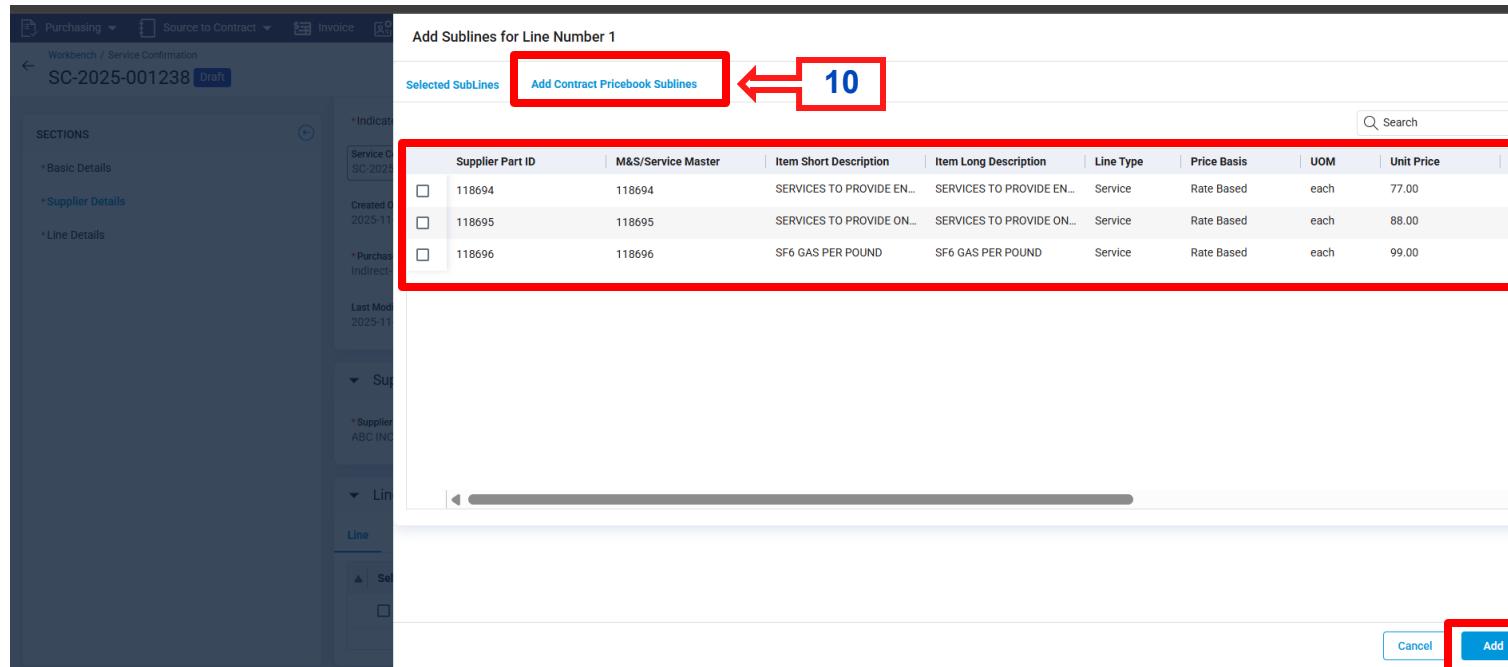
10 When the Add Sublines for Line Number 1, slider will appear, Click **"Add Contract Pricebook Sublines"**.

11 Select the appropriate services from the Contract Pricebook Sublines by clicking the **Checkbox** on the lines.

There may be more than one screen of negotiated services on the contract, so you may need to page through the Contract Pricebook Sublines.

12 Click **"Add"** at the bottom of the screen.

Service Confirmation Inputs - Supplier

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13 In the Line Details section, you will see that the added sublines now appears in as (**1.2 & 1.3**) format and the Quantity field is available for entry. Enter the service confirmation quantity, and specify the Service Start and End Dates for each line.

14 Click on **"Comments and Attachments"** section to add supporting documents.

Service Confirmation Inputs - Supplier

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15 After clicking on **'Comments & Attachments'**, Sliders will appear where you can add your comments and upload attachments, then click **'Post'**.

Service Confirmation Inputs - Supplier

Select Your Purchase Order → **Create Your Service Confirmation** → **ERS Automates Invoice Creation**

16 After verifying and uploading the documents and click **'Submit'**.
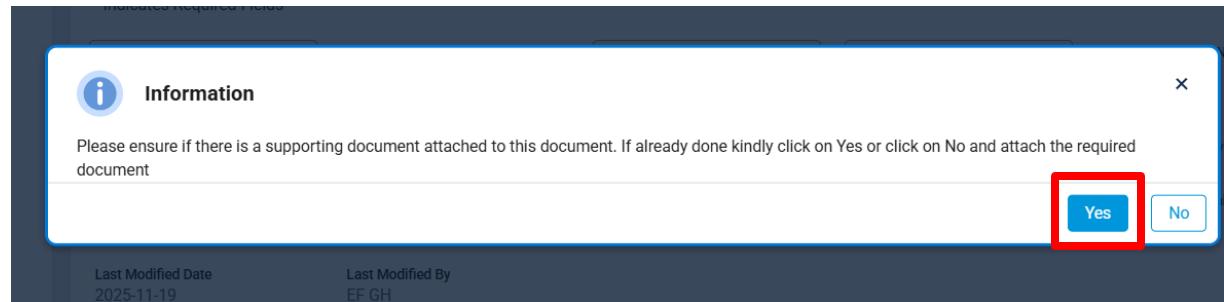
17 A confirmation prompt will appear on screen. Click **'Yes'** button to send for an approval.

Information

Please ensure if there is a supporting document attached to this document. If already done kindly click on Yes or click on No and attach the required document

Yes   No   **17**

Review Service Confirmation Status

Select Your Purchase Order → **Create Your Service Confirmation** → **ERS Automates Invoice Creation**

18 Check the status of your Service Confirmation:
- **Draft**: Created but not Submitted
- **Approval Pending**: Submitted and pending Approval
- **Approved**: Service Confirmation Approved

What's Next?

The person named as the **Vendor Confirmation Approver** will receive an email notification indicating the service confirmation is ready for review and approval. Once the service confirmation is approved, the Status will change to **Approved.**

Monitor the Status of the service confirmation on the Service Confirmation Workbench.