

MANUFACTURING

PRODUCTION - ADD A THIRD PARTY SERVICE REQUEST

If you need a third party sub contractor to do work for you, then you can raise a **Third Party Service Request** from the **Production** listing screen.

From this Service Request, you can start a <u>Non-Stock Procurement</u> cycle, i.e. Raise a *Purchase Order* to the Supplier, a *Non-Stock Goods Received Note* and a *Supplier Invoice*.

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Ribbon Access: Manufacturing > Production



The *Production* listing screen will display.

SELECT PRODUCTION RUN

• Click on the *expand* button in the *row* of the *production run* that you wish to add a sub-contract service request to.

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The *Production Work Orders* frame will be expanded.

SELECT WORK ORDER

- *Right click* anywhere in the *row* of the *work order* that you wish to link the sub-contract service request to.
 - Note: Remember or make note of, the selected work order number.



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ProductionRef	 PartCode 	PartDesc	ProductionForeman	StartDate	StartTime	SchedEndDate	SchedEndTime	EndDate	EndTime	PlannedQty	CompletionComments	ActualQty	Status	AmendDate	
E PROD0000074	A4ADB01	A4 Architects Dra	Bianca Du Toit	13 Aug 2018	00:04:33	14 Aug 2018	00:04:33	01 Jan 1900	00:00:00	3		0	Α	1900/01/01	
PROD0000073	Az4DB	A4 Drawing Book	Tammy Du Toit	01 Apr 2018	09:00:00	01 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2		2	Α	1900/01/01	
PROD0000072	Az4DB	A4 Drawing Book	Theo Peterson	12 Apr 2001	09:00:00	12 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000070	Az4DB	A4 Drawing Book	Abigail Milne	28 Nov 2017	13:38:10	29 Nov 2017	13:38:10	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
Production Wo	k Orders														
9 WOCode	Description		Site	Name WOTyp	e Status S	tatusDescription	Priority Work	Priority Requ	estDate Rec	uestTime In	voiceable Capitalise F	ProjectRef	ProjectD	esc CalRefe	rence
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4															
PROD0000069	Az4DB	A4 Drawing Book	Belinda Sharman	28 Nov 2017	12:16:29	29 Nov 2017	12:16:29	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000052	DR111111	Drum	Judith Mudzengi	06 Apr 2017	10:51:25	07 Apr 2017	10:51:25	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000051	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	10:48:23	07 Apr 2017	10:48:23	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000050	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	10:28:28	07 Apr 2017	10:28:28	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000049	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	09:40:54	07 Apr 2017	09:40:54	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000047	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:56:52	03 Mar 2017	11:56:52	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000046	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:45:56	03 Mar 2017	11:45:56	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	ACR11111	Acer Copier	Belinda Sharman	02 Mar 2017	11:24:49	03 Mar 2017	11:24:49	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	TMACH	Test Machine	Belinda Sharman	02 Mar 2017	11:03:15	03 Mar 2017	11:03:15	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000043	DR111111	Drum	Belinda Sharman	01 Mar 2017	09:10:01	02 Mar 2017	09:10:01	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000042	TMACH	Test Machine	Belinda Sharman	01 Mar 2017	08:44:47	02 Mar 2017	08:44:47	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000041	ACR 11111	Acer Copier	Judith Mudzengi	28 Feb 2017	22:06:07	01 Mar 2017	22:06:07	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000040	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	21:44:35	01 Mar 2017	21:44:35	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000039	Az4DB	A4 Drawing Book	Belinda Sharman	28 Feb 2017	18:49:38	01 Mar 2017	18:49:38	01 Jan 1900	00:00:00	2		2	A	2017/02/28	
	DR111111	Drum	Belinda Sharman	28 Feb 2017	18:07:24	01 Mar 2017	18:07:24	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000038			Belinda Sharman	28 Feb 2017	17:47:50	01 Mar 2017	17:47:50	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
	DR111111	Drum	Beinda Sharman											1900/01/01	
E PROD0000038	DR111111 ACR11111	Drum Acer Copier	Belinda Sharman Belinda Sharman	28 Feb 2017	17:20:44	01 Mar 2017	17:20:44	01 Jan 1900	00:00:00	2		2			
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PROD00000038 PROD00000037 PROD00000036 PROD00000035 PROD00000034	ACR11111 ACR11111	Acer Copier Acer Copier	Belinda Sharman Belinda Sharman	28 Feb 2017	09:20:59	01 Mar 2017	09:20:59	01 Jan 1900	00:00:00	1		1	A A		
PROD0000038 PROD00000037 PROD00000036 PROD00000035	ACR11111 ACR11111 ACR11111	Acer Copier Acer Copier Acer Copier	Belinda Sharman Belinda Sharman Belinda Sharman	28 Feb 2017 28 Feb 2017	09:20:59 08:53:09	01 Mar 2017 01 Mar 2017	09:20:59 08:53:09	01 Jan 1900 01 Jan 1900	00:00:00	1		1	A A A	1900/01/01	
PROD0000038 PROD00000037 PROD00000036 PROD00000035 PROD00000034 PROD00000033	ACR11111 ACR11111 ACR11111 ACR11111 Az4DB	Acer Copier Acer Copier Acer Copier A4 Drawing Book	Belinda Sharman Belinda Sharman Belinda Sharman Bianca Du Toit	28 Feb 2017 28 Feb 2017 28 Feb 2017	09:20:59 08:53:09 08:10:52	01 Mar 2017 01 Mar 2017 01 Mar 2017	09:20:59 08:53:09 08:10:52	01 Jan 1900 01 Jan 1900 01 Jan 1900	00:00:00 00:00:00 00:00:00	1 2 1		1 2 1	A A A A	1900/01/01 1900/01/01	

• A *Process* menu will pop up.

ADD THIRD PARTY SERVICE REQUEST

 Click on *Service Requests* - Add New Third Party Service Request.



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ProductionRe	ef 🔻	PartCode	PartDesc	ProductionForeman	StartDate	StartTime	SchedEndDate	SchedEndTime	EndDate	EndTime	PlannedQty	CompletionComments	ActualQty	Status	AmendDate		
E PROD0000		A4ADB01	A4 Architects Dra	Bianca Du Toit	13 Aug 2018		14 Aug 2018	00:04:33	01 Jan 1900	00:00:00	3		0	Α	1900/01/01		
PROD000		Az4DB	A4 Drawing Book	Tammy Du Toit	01 Apr 2018	09:00:00	01 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2			A	1900/01/01		
PROD000		Az4DB	A4 Drawing Book	Theo Peterson	12 Apr 2001	09:00:00	12 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2			A	1900/01/01		
E PRODODO	00070	Az4DB	A4 Drawing Book	Abigail Milne	28 Nov 2017	13:38:10	29 Nov 2017	13:38:10	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
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< woo	Code	Description		Sit	eName WOTyp	oe Status	StatusDescription	Priority Work	Priority Requi	estDate Rec	questTime In	voiceable Capitalise I	ProjectRef	ProjectD	esc CalRet	erence	: 0
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4			Process						-								
PROD000	00069	Az4DB	Time		28 Nov 2017	12:16:29	29 Nov 2017	12:16:29	01 Jan 1900	00:00:00	1		1	Α	1900/01/01		
E PROD000	00052	DR111111	Add New Time	Booking	06 Apr 2017	10:51:25	07 Apr 2017	10:51:25	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
E PROD000	00051	ACR 11111	Services	1.0	05 Apr 2017	10:48:23	07 Apr 2017	10:48:23	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
PROD000	00050	ACR11111	Add New prices		06 Apr 2017	10:28:28	07 Apr 2017	10:28:28	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
PROD000	00049	ACR11111	Service Requ	ests Party Service Request	06 Apr 2017	09:40:54	07 Apr 2017	09:40:54	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
E PROD000	00047	Az4DB	Addition mild	rary service request	02 Mar 2017	11:56:52	03 Mar 2017	11:56:52	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
PROD000	00046	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:45:56	03 Mar 2017	11:45:56	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
PROD000	00045	ACR11111	Acer Copier	Belinda Sharman	02 Mar 2017	11:24:49	03 Mar 2017	11:24:49	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
E PROD000	00044	TMACH	Test Machine	Belinda Sharman	02 Mar 2017	11:03:15	03 Mar 2017	11:03:15	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
PROD000	00043	DR111111	Drum	Belinda Sharman	01 Mar 2017	09:10:01	02 Mar 2017	09:10:01	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
PROD000	00042	TMACH	Test Machine	Belinda Sharman	01 Mar 2017	08:44:47	02 Mar 2017	08:44:47	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
	00041	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	22:06:07	01 Mar 2017	22:06:07	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
E PRODODO	00040	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	21:44:35	01 Mar 2017	21:44:35	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
PROD000	00039	Az4DB	A4 Drawing Book	Belinda Sharman	28 Feb 2017	18:49:38	01 Mar 2017	18:49:38	01 Jan 1900	00:00:00	2		2	A	2017/02/28		
	00038	DR111111	Drum	Belinda Sharman	28 Feb 2017	18:07:24	01 Mar 2017	18:07:24	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
	00037	DR111111	Drum	Belinda Sharman	28 Feb 2017	17:47:50	01 Mar 2017	17:47:50	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
PROD000	00036	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	17:20:44	01 Mar 2017	17:20:44	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
PROD000	00035	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	09:20:59	01 Mar 2017	09:20:59	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
E PRODODO	00034	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	08:53:09	01 Mar 2017	08:53:09	01 Jan 1900	00:00:00	2		2	A	1900/01/01		
100000000000000000000000000000000000000	00033	Az4DB	A4 Drawing Book	Bianca Du Toit	28 Feb 2017	08:10:52	01 Mar 2017	08:10:52	01 Jan 1900	00:00:00	1		1	A	1900/01/01		
PROD0000	00032	SP 18 18	Sprint copier	Belinda Sharman	10 Aug 2018	12:00:42	11 Aug 2018	12:00:42	01 Jan 1900	00:00:00	3		0	A	2018/08/10		
 PROD0000 PROD0000 		ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	08:06:45	01 Mar 2017	08:06:45	01 Jan 1900	00:00:00	2		2	A	2017/02/28		
	00030		A4 Drawing Book	Bianca Du Toit	18 Feb 2016	14:51:10	19 Feb 2016	14:51:10	01 Jan 1900	00:00:00	1		0	A	1900/01/01		

The *Third Party Services* screen will be displayed.

SEARCH FOR AND SELECT THE SERVICE

- The *Work Order* field will be auto populated with the previously selected work order number.
- Click on the *search* button in the *Service* field.



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- The *Select a service for this work order* pop up screen will appear.
- Select the *row* of the *service* you wish to link to this work order.
- Click on *Ok*.



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Billable	e 🔲	DEA	Dealer Service Fee	EXT	SER	350.00		VAT	1	15.00					
Comment		DEL	Delivery Fee	INT	SER	150.00		VAT	1	15.00					
		DES	Design consultation	INT	SER	450.00	ea	VAT	1	15.00	A				
		INSP	Inspection	INT	SER	100.00	ea	VAT	1	15.00	A				
		INST	Installation Fee	INT	SER	350.00	ea	VAT	1	15.00	A				
		INST	Installation Fee	INT	SER	350.00		VAT	1	15.00					
		MYS	Meter Yield Short Fall	INT	SER	500.00		VAT	1	15.00					
		▶ PRI	Printing	INT	SER	350.00		VAT	1	15.00					
		SET	Settlements Short Term Contract Deposit	INT	SER	500.00		VAT	1	15.00					
		TEST	Test Service	INT	SER	250.00		VAT	1	15.00					
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			10000 C	1000	1.11111		12.20	10000	1.256	100	1116				
		-													

ADD SERVICE REQUEST DETAILS

- **Service:** This will now be populated with the service code selected in the previous step.
- **Description:** This will now be populated with the service description. Update this field with any additional relevant information for the Supplier, for example, serial number if applicable, as this detail will pull through to the Purchase Order.
- **Quantity:** This will auto populate with **1**. You can use the directional arrows to select an alternative quantity amount if required.
- **Price:** This will auto populate with the price of this service currently set up on the system. You can type in an alternative price if required.



- Assigned To: This will auto populate with the person currently logged on to the system. You can click on the drop-down arrow and select an alternative employee if required.
- **Required Date:** This will auto populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- Billable: This check box should be unticked.
- **Comment:** Type a relevant comment regarding this third party service request.

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SAVE LINKED SERVICE

• When you have finished adding details to the Third Party Service screen, click on *Save*.



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You will return to the *Production* listing screen.

- A *Service Processing* message box will pop up informing you that;
 - Service Request on WO: [] complete.
- Click on OK.



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	A4ADB01	A4 Architects Dra		13 Aug 2018	00:04:33	14 Aug 2018	00:04:33	01 Jan 1900	00:00:00	3			A	1900/01/01	
	Az4DB	A4 Drawing Book	Tammy Du Toit	01 Apr 2018	09:00:00	01 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2			A	1900/01/01	
	Az4DB	A4 Drawing Book	Theo Peterson	12 Apr 2001		12 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2			A	1900/01/01	
	Az4DB	A4 Drawing Book	Abigail Milne	28 Nov 2017	1	29 Nov 2017	13:38:10	01 Jan 1900	00:00:00	2			A	1900/01/01	
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	ACR11111	J Service	Request on wo : w	COULD IN COM	nete.	07 Apr 2017	10:28:28	01 Jan 1900	00:00:00	2			Α	1900/01/01	
	ACR11111					07 Apr 2017	09:40:54	01 Jan 1900	00:00:00	2			A	1900/01/01	
PROD0000047	Az4DB				ж	03 Mar 2017	11:56:52	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000046	Az4DB					03 Mar 2017	11:45:56	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	ACR 11111	Acer Copier	Belinda Sharman	02 Mar 2017	11:24:49	03 Mar 2017	11:24:49	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	TMACH	Test Machine	Belinda Sharman	02 Mar 2017	11:03:15	03 Mar 2017	11:03:15	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	DR111111	Drum	Belinda Sharman	01 Mar 2017	09:10:01	02 Mar 2017	09:10:01	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	TMACH	Test Machine	Belinda Sharman	01 Mar 2017	08:44:47	02 Mar 2017	08:44:47	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000041	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	22:06:07	01 Mar 2017	22:06:07	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000040	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	21:44:35	01 Mar 2017	21:44:35	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
	Az4DB	A4 Drawing Book	Belinda Sharman	28 Feb 2017	18:49:38	01 Mar 2017	18:49:38	01 Jan 1900	00:00:00	2		2	A	2017/02/28	
PROD0000038	DR111111	Drum	Belinda Sharman	28 Feb 2017	18:07:24	01 Mar 2017	18:07:24	01 Jan 1900	00:00:00	2		2	Α	1900/01/01	
	DR111111	Drum	Belinda Sharman	28 Feb 2017	17:47:50	01 Mar 2017	17:47:50	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000036	ACR 11111	Acer Copier	Belinda Sharman	28 Feb 2017	17:20:44	01 Mar 2017	17:20:44	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	09:20:59	01 Mar 2017	09:20:59	01 Jan 1900	00:00:00	1		1	Α	1900/01/01	
PROD0000034	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	08:53:09	01 Mar 2017	08:53:09	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000033	Az4DB	A4 Drawing Book	Bianca Du Toit	28 Feb 2017	08:10:52	01 Mar 2017	08:10:52	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000032	SP 18 18	Sprint copier	Belinda Sharman	10 Aug 2018	12:00:42	11 Aug 2018	12:00:42	01 Jan 1900	00:00:00	3		0	A	2018/08/10	
■ PROD0000030	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	08:06:45	01 Mar 2017	08:06:45	01 Jan 1900	00:00:00	2		2	A	2017/02/28	
E PROD0000027	Az4DB	A4 Drawing Book	Bianca Du Toit	18 Feb 2016	14:51:10	19 Feb 2016	14:51:10	01 Jan 1900	00:00:00	1		0	A	1900/01/01	

VIEW LINKED WORK ORDER

• Now you can view the work order with the linked third party service request in **2** different screens.

Either

IN THE WORK ORDER LISTING SCREEN

• Navigate to the *Work Order Listing* screen.

Ribbon Access: Service > Work Orders



	Current Tech Activity	Technicians Availabil Exceptio	ity Calls Work (Orders Servia		Work Manager	ent My Work Orders	My Tickets	All Open Tickets	My Work					
	Technical		4	Proc			4	Ticketing	4	Open 🦼					
ProductionRef -	PartCode	PartDesc	ProductionForeman	StartDate	StartTime	SchedEndDate	SchedEndTime	EndDate	EndTime	PlannedOty	CompletionComments	ActualOty	Status	AmendDate	
E PROD0000074	A4ADB01	A4 Architects Dra	Bianca Du Toit	13 Aug 2018	00:04:33	14 Aug 2018	00:04:33	01 Jan 1900	00:00:00	3		0	A	1900/01/01	
PROD0000073	Az4DB	A4 Drawing Book	Tammy Du Toit	01 Apr 2018	09:00:00	01 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000072	Az4DB	A4 Drawing Book	Theo Peterson	12 Apr 2001	09:00:00	12 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000070	Az4DB	A4 Drawing Book	Abigail Milne	28 Nov 2017	13:38:10	29 Nov 2017	13:38:10	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000069	Az4DB	A4 Drawing Book	Belinda Sharman	28 Nov 2017	12:16:29	29 Nov 2017	12:16:29	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000052	DR111111	Drum	Judith Mudzengi	06 Apr 2017	10:51:25	07 Apr 2017	10:51:25	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000051	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	10:48:23	07 Apr 2017	10:48:23	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000050	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	10:28:28	07 Apr 2017	10:28:28	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000049	ACR 11111	Acer Copier	Judith Mudzengi	06 Apr 2017	09:40:54	07 Apr 2017	09:40:54	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000047	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:56:52	03 Mar 2017	11:56:52	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000046	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:45:56	03 Mar 2017	11:45:56	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000045	ACR11111	Acer Copier	Belinda Sharman	02 Mar 2017	11:24:49	03 Mar 2017	11:24:49	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000044	TMACH	Test Machine	Belinda Sharman	02 Mar 2017	11:03:15	03 Mar 2017	11:03:15	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000043	DR111111	Drum	Belinda Sharman	01 Mar 2017	09:10:01	02 Mar 2017	09:10:01	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000042	TMACH	Test Machine	Belinda Sharman	01 Mar 2017	08:44:47	02 Mar 2017	08:44:47	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000041	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	22:06:07	01 Mar 2017	22:06:07	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000040	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	21:44:35	01 Mar 2017	21:44:35	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000039	Az4DB	A4 Drawing Book	Belinda Sharman	28 Feb 2017	18:49:38	01 Mar 2017	18:49:38	01 Jan 1900	00:00:00	2		2	A	2017/02/28	
PROD0000038	DR111111	Drum	Belinda Sharman	28 Feb 2017	18:07:24	01 Mar 2017	18:07:24	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000037	DR111111	Drum	Belinda Sharman	28 Feb 2017	17:47:50	01 Mar 2017	17:47:50	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000036	ACR 11111	Acer Copier	Belinda Sharman	28 Feb 2017	17:20:44	01 Mar 2017	17:20:44	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000035	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	09:20:59	01 Mar 2017	09:20:59	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000034	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	08:53:09	01 Mar 2017	08:53:09	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000033	Az4DB	A4 Drawing Book	Bianca Du Toit	28 Feb 2017	08:10:52	01 Mar 2017	08:10:52	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000032	SP1818	Sprint copier	Belinda Sharman	10 Aug 2018	12:00:42	11 Aug 2018	12:00:42	01 Jan 1900	00:00:00	3		0	A	2018/08/10	
PROD0000030	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	08:06:45	01 Mar 2017	08:06:45	01 Jan 1900	00:00:00	2		2	A	2017/02/28	
E PROD0000027	Az4DB	A4 Drawing Book	Bianca Du Toit	18 Feb 2016	14:51:10	19 Feb 2016	14:51:10	01 Jan 1900	00:00:00	1		0	A	1900/01/01	

• In the *Work Order Listing* screen, either use the Find WO button or use the Filter Row in the *WO Code* column to find the work order.



dd Edit Delete Vie	w Close Com	plete Reinstate Save Layout	Export	Durban Open		Find WO	Reports							
Maintain	Pro	cess Format Print			Current		Reports							
iks #	-1		- 1											
ter text to search P													-	
	WOCode	Description	PartCode	SerialNo	PartDesc	CallReference	CalDesc	ProjectRef	ProjectDesc	AssetRegNo	ModelNo	Capitalise Priorit	y Invoiceable	e
unctions	۴													
-	🖽 WO0001611	toner				CN0000542	toner					No	2 No	
Time	III WO0001613	test call swap out po status	SP1020	1020	Copier	CN0000543	test ca			AREG000006	SP1020	No	3 No	
	WO0001615	Created for production batch - test										No	2 No	
	▶ 🖂 WO0001616	Created for production batch - test2										No	2 No	1
Services	III WO0001618	Test call for swap out - check whichitems are relin				CN0000545	Test c					No	3 No	
	· WO0001619	Copier repair required - swap out machine				CN0000546	Copier					No	3 No	
	III WO0001620	test				CN0000547	test					No	2 No	
Third Party Services	III WO0001621	Test work order linked to project.						PR30000283	Test Project			No	2 No	
	II WO0001622	New deal Rental Test						PRJ0000284	New Deal			No	2 No	
	WO0001623	test - contract dosure - customer asset				CN0000548	test - c					No	2 No	
Parts	III WO0001624	Contract Closure - CO0000010	1020-478	478-1	Staple Unit					AREG000260	1020	No	2 No	
	🗉 WO0001625	Contract Closure - CO0000010	SP2020	ADJ-T	SP2020					AREG000304	SP2020	No	2 No	
	WO0001626	Test new swap out process on tech connect	SP2020	abc147a	SP2020	CN0000549	Test n				SP2020	No	3 No	
-	🗄 WO0001627	Asset to Asset swap out test	SP2020	2020	SP2020	CN0000550	Asset t				SP2020	No	3 No	
Loans	III WO0001629	Test swap outs for tech connect	SP19-1	1912	SP19-12	CN0000552	Test s				SP19-12	No	3 No	
	🗉 WO0001630	Repair required for copier - swap out with new unit	SP2020	2020	SP2020	CN0000553	Repair			AREG000013	SP2020	No	3 No	
	🖽 WO0001631	Test creating a work order from within a project.						PR.30000099	Install Ma			No	2 No	
Swap Outs	III WO0001632	test adding a work order navigating from the call \ldots				CN0000547	test					No	2 No	
	WO0001633	Test call creation for machine in site 1 - customer	SP2020	20-12	SP2020	CN0000557	Test c			123	SP2020	No	3 No	
	⊞ WO0001634	Test call list refreshing after saving a new call.	1458-9	SIN32	К147 Ку	CN0000558	Test c				K147	No	3 No	
Meters	E WO0001636	TES2.2 - Work Order 2						PR30000287	Specificati			No	2 No	
	· WO0001637	TES3.1 - Work Order 3						PR.30000288	Design BPO2			No	2 No	
	WO0001639	TES4.1 - Work Order 5						PR.30000289	Developm			No	2 No	
Expenses	III WO0001640	TES4.2 - Work Order 6						PR.30000289	Developm			No	2 No	
Experiess	🗉 WO0001641	TES5.1 - Work Order 6						PRJ0000290	Testing BP			No	2 No	
	WO0001642	TES5.2 - Work Order 8						PRJ0000290	Testing BP			No	2 No	
	B WO0001643	TES6.1 - Work Order 9						PR30000291	Implement			No	2 No	
Travel 1	E WO0001644	TES6.2 - Work Order 10						PR30000291	Implement			No	2 No	
	I WO0001646	Test logging a call - listing should auto refresh	1458-9	SIN32	K147 Ky	CN0000560	Test lo				K147	No	3 No	
	· WO0001647	NDR				CN0000561	NDR					No	2 No	
Documents	B WO0001648	Contract Closure - CO0000059	SP2020	2020	SP2020						SP2020	No	2 No	
	. WO0001649	Contract Closure - CO0000054	SP2020	2020	SP2020					AREG000292	SP2020	No	2 No	
	WO0001653	Contract Closure - CO0000010			SP19-12						SP19-12	No	2 No	
Warranties Issued		New Deal Sale 4 Installation				CN0000562	nds4					No	2 No	
		1											~	

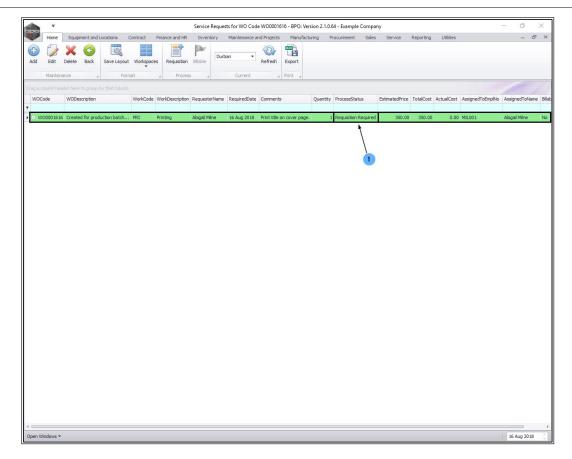
- 1. In this image, the *filter row* has been used to find the work order.
- 2. Ensure that the *row selector* is in front of the work order (if your search brought up more than one work order).
- 3. Click on the *Third Party Services* tile.



Home E						rder Listin										-	0	×
	Equipment and Locat	ons Contra	ict Finani	ce and HR Inven		ntenance ar			acturing Pro	ourement	Sales 5	iervice Rep	orting Ut	lities			- 6	R (2)
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nks	4	110000		1 Tornac	al	· 4	Ann		Contains([W0		16')							
nks nter text to search,.	0						мрр	lieu riiter:	contains([wo	codel, 10	10)							
	Urag a co	um header her														/	- /	
Functions	WOCo		cription			PartCode	SerialNo	PartDesc	CallReference	CalDesc	ProjectRef	ProjectDesc	AssetRegNo	ModelNo	Capitalise	e Priority	Invoiceable	Ba
Time	♥ 1616 ▶ ⊞ WO			uction batch - test2											No		No	A
Services Third Party Servic Parts Loans		2																
Swap Outs Meters																		
Travel	1																	
Travel																		
Travel Documents	۰	ntains([WOCod	(a) ¹ 1616 ¹														E4	t Fil

- The *Service Requests for WO Code []* screen will be displayed.
- Here you can view the work order and the linked third party service request.
- You will note that the *Process Status* is *Requisition Required*.
 You will need to create a service requisition to complete this process.





Or

IN THE SERVICE REQUESTS LISTING SCREEN

• Navigate to the *Service Requests* listing screen.

Ribbon Access: Service > Service Requests



	ipment and Loca	tions Contract	Finance and HR	Inventory	Maintenance	and Projects	Manufacturing	Procureme	nt Sales	Service	Reporting Utilitie	s		÷	8
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		Technicians Availabil	ity Calls Work	Orders Serv	ice WIP	Work Manager			All Open	My Work					
	Activity	Exception	ins	Requi			Orders		Tickets						
	Technical		4	Pro	Cess		4	Ticketing	4	Open 🔺					
ProductionRef •	PartCode	PartDesc	ProductionForeman	StartDate	StartTime	SchedEndDate	SchedEndTime	EndDate	EndTime	PlannedQty	CompletionComments	ActualQty	Status	AmendDate	
E PROD0000074	A4ADB01	A4 Architects Dra	Bianca Du Toit	13 Aug 2018	00:04:33	14 Aug 2018	00:04:33	01 Jan 1900	00:00:00	3		0	A	1900/01/01	
PROD0000073	Az4DB	A4 Drawing Book	Tammy Du Toit	01 Apr 2018	09:00:00	01 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000072	Az4DB	A4 Drawing Book	Theo Peterson	12 Apr 2001	09:00:00	12 Apr 2018	11:00:00	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000070	Az4DB	A4 Drawing Book	Abigal Milne	28 Nov 2017	13:38:10	29 Nov 2017	13:38:10	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
	Az4DB	A4 Drawing Book	Belinda Sharman	28 Nov 2017	12:16:29	29 Nov 2017	12:16:29	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000052	DR111111	Drum	Judith Mudzengi	06 Apr 2017	10:51:25	07 Apr 2017	10:51:25	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000051	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	10:48:23	07 Apr 2017	10:48:23	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000050	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	10:28:28	07 Apr 2017	10:28:28	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000049	ACR11111	Acer Copier	Judith Mudzengi	06 Apr 2017	09:40:54	07 Apr 2017	09:40:54	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
PROD0000047	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:56:52	03 Mar 2017	11:56:52	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000046	Az4DB	A4 Drawing Book	Belinda Sharman	02 Mar 2017	11:45:56	03 Mar 2017	11:45:56	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000045	ACR11111	Acer Copier	Belinda Sharman	02 Mar 2017	11:24:49	03 Mar 2017	11:24:49	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
	TMACH	Test Machine	Belinda Sharman	02 Mar 2017	11:03:15	03 Mar 2017	11:03:15	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000043	DR111111	Drum	Belinda Sharman	01 Mar 2017	09:10:01	02 Mar 2017	09:10:01	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000042	TMACH	Test Machine	Belinda Sharman	01 Mar 2017	08:44:47	02 Mar 2017	08:44:47	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
PROD0000041	ACR11111	Acer Copier	Judith Mudzenai	28 Feb 2017	22:06:07	01 Mar 2017	22:06:07	01 Jan 1900	00:00:00	1		1	A	1900/01/01	
E PROD0000040	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	21:44:35	01 Mar 2017	21:44:35	01 Jan 1900	00:00:00	2		2	A	1900/01/01	
E PROD0000039	Az4DB	A4 Drawing Book	Belinda Sharman	28 Feb 2017	18:49:38	01 Mar 2017	18:49:38	01 Jan 1900	00:00:00	2			A	2017/02/28	
PROD0000038	DR111111	Drum	Belinda Sharman	28 Feb 2017	18:07:24	01 Mar 2017	18:07:24	01 Jan 1900	00:00:00	2			A	1900/01/01	
PROD0000037	DR111111	Drum	Belinda Sharman	28 Feb 2017	17:47:50	01 Mar 2017	17:47:50	01 Jan 1900	00:00:00	2			A	1900/01/01	
E PROD0000036	ACR 11111	Acer Copier	Belinda Sharman	28 Feb 2017	17:20:44	01 Mar 2017	17:20:44	01 Jan 1900	00:00:00	2			A	1900/01/01	
PROD0000035	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	09:20:59	01 Mar 2017	09:20:59	01 Jan 1900	00:00:00	1			A	1900/01/01	
PROD0000034	ACR11111	Acer Copier	Belinda Sharman	28 Feb 2017	08:53:09	01 Mar 2017	08:53:09	01 Jan 1900	00:00:00	2			A	1900/01/01	
PROD00000033	Az4DB	A4 Drawing Book	Bianca Du Toit	28 Feb 2017	08:10:52	01 Mar 2017	08:10:52	01 Jan 1900	00:00:00	1			A	1900/01/01	
PROD00000032	SP1818	Sprint copier	Belinda Sharman	10 Aug 2018	12:00:42	11 Aug 2018	12:00:42	01 Jan 1900	00:00:00	3			A	2018/08/10	
PROD0000032	ACR11111	Acer Copier	Judith Mudzengi	28 Feb 2017	08:06:45	01 Mar 2017	08:06:45	01 Jan 1900	00:00:00	2			A	2018/08/10	
E PROD0000027	Az4DB	A4 Drawing Book	Bianca Du Toit		14:51:10	19 Feb 2016	14:51:10	01 Jan 1900	00:00:00	1			A	1900/01/01	

- 1. *Scroll down* or
- 2. use the *filter row* to find the work order.



2	Home	Equipment and Lo	ocations (Contract Fina	ance and HR Ir	nventory M	aintenance and Projects	Manu	facturing	Procurement	Sales Servio	e Repo	rting Uti	ities	-	8
		× 😋	27			×										
-	Edit D	elete Back	Save Layout	Workspaces	Requisition Billa	ble		Export								
	Maintenan	ce 4	Form	nat "	Process		Current _ P	Print								
OCod	de	WODescription	WorkCode	WorkDescription	RequestorName	RequiredDate	Comments		Quantity	ProcessStatus	EstimatedPrice	TotalCost	ActualCost	AssignedToEmplNo	AssignedToName	Bill
		-	2													
WO	0000118	BathBinMaint	INSP	Inspection	Abigail Milne	05 Jul 2018	Site inspection required.		1	Requisition Required	100.00	100.00	0.00	MIL001	Abigail Mine	Ye
WO	0000118	BathBinMaint	DEL	Delivery Fee	Abigail Milne	05 Jul 2018	Deliver deaning supplier to	o site.	1	Requisition Required	150.00	150.00	0.00	MIL001	Abigail Milne	Yes
WO	0000499	SP1912_NDS	DEL	Delivery Fee	Bianca Du Toit	14 May 2015			1	Requisition Required	150.00	150.00	0.00	DUT001	Bianca Du Toit	Ye
WO	0000500	SP1912_NDS	TRA	Employee Tra	Bianca Du Toit	15 May 2015			1	Requisition Required	750.00	750.00	0.00	DUT001	Bianca Du Toit	Yes
WO	0000806	test	DEA	Outsourced r	Bianca Du Toit	29 Mar 2016			1	Requisition Required	100.00	100.00	0.00	DUT001	Bianca Du Toit	Yes
WO	8080000	Test auto appl		Outsourced r	Bianca Du Toit	29 Mar 2016			1	Requisition Required	100.00	100.00	0.00	DUT001	Bianca Du Toit	Yes
WO	0000855	SP240-1 - Mac	DEL	Supplier Deliv	Bianca Du Toit	27 May 2016			1	Requisition Required	450.00	450.00	0.00	DUT001	Bianca Du Toit	Ye
	0000885	test	CALL	Call Out Fee	Bianca Du Toit	25 Jul 2016				Requisition Required	250.00	250.00		DUT001	Bianca Du Toit	Yes
	0000890	Tier - Commer	INST	Installation Fee	Bianca Du Toit	12 Aug 2016				Requisition Required	350.00	350.00		DUT001	Bianca Du Toit	Yes
WO	0000890	Tier - Commer	CALL	Call Out Fee	Bianca Du Toit	12 Aug 2016			1	Requisition Required	250.00	250.00		DUT001	Bianca Du Toit	Yes
	0000959	Machine repair		Call Out Fee	Blanca Du Toit	15 Sep 2017				Requisition Required	100.00	100.00		DUT001	Bianca Du Toit	Yes
	0000969	12345 - New	DEL	Delivery Fee	Bianca Du Toit	08 Nov 2016	Generated from sales orde			Requisition Required	150.00	150.00		DUT001	Bianca Du Toit	Yes
	0000984	BPOv2 test order		Dealer Servic	Bianca Du Toit	02 Feb 2017	Generated from sales orde	er n		Requisition Required	350.00	350.00		DUT001	Bianca Du Toit	Yes
WO	0000995	Service Requir	INSP	Inspection					1	Requisition Required	500.00	500.00		MUD001	Judith Mudzengi	Yes
wo	0000995	Service Requir	DEA	Dealer Servic	Judith Mudzengi	07 Feb 2017			1	Requisition Required	1 000.00	1 000.00	0.00	MUD001	Judith Mudzengi	Yes
WO	0000995	Service Requir	DEL	Delivery Fee	Judith Mudzengi	07 Feb 2017			1	Requisition Required	300.00	300.00	0.00	MUD001	Judith Mudzengi	Yes
WO	0001018	Services reque	INSP	Inspection	Judith Mudzengi	08 Feb 2017			1	Requisition Required	100.00	100.00	0.00	MUD001	Judith Mudzengi	Yes
WO	0001018	Services reque	INST	Installation Fee	Judith Mudzengi	08 Feb 2017			2	Requisition Required	500.00	500.00	0.00	MUD001	Judith Mudzengi	No
WO	0001021	Billable third p	CALL	Call Out Fee	Judith Mudzengi	08 Feb 2017			1	Requisition Required	200.00	200.00	0.00	MUD001	Judith Mudzengi	Yes
WO	0001038	Call Part Requ	. CLA	Cleaning Fee	Judith Mudzengi	15 Jun 2017			1	Requisition Required	500.00	500.00	0.00	MUD001	Judith Mudzengi	Yes
WO	0001048	B call part req	INST	Installation Fee	Bianca Du Toit	15 Feb 2017	Generated from sales orde	er n	1	Requisition Required	350.00	350.00	0.00	DUT001	Bianca Du Toit	No
WO	0001056	QT0000105	DEL	Delivery Fee	Judith Mudzengi	17 Feb 2017	Generated from sales orde	er n	1	Requisition Required	150.00	150.00	0.00	MUD001	Judith Mudzengi	Yes
wo	0001056	QT0000105	TRA		Judith Mudzengi	17 Feb 2017	Generated from sales orde	er n	1	Requisition Required	750.00	750.00	0.00	MUD001	Judith Mudzengi	Yes
WO	0001061	3MS - 3 Month	DEL	Delivery Fee	Judith Mudzengi	24 Feb 2017			1	Requisition Required	100.00	100.00	0.00	DUT001	Bianca Du Toit	Yes
WO	0001062	3MS - 3 Month		Delivery Fee	Judith Mudzengi	24 Feb 2017			1	Requisition Required	100.00	100.00		DUT001	Bianca Du Toit	Yes
WO	0001064	3MS - 3 Month	DEL	Delivery Fee	Judith Mudzengi	24 Feb 2017			1	Requisition Required	100.00	100.00	0.00	DUT001	Bianca Du Toit	Yes
wo	0001128	Created for pr	DEL	Delivery Fee	Abigail Milne	16 Aug 2018	Deliver parts to production	n ce	1	Requisition Required	150.00	150.00	0.00	MIL001	Abigail Milne	Yes
wo	0001152	installation of	DEL	Delivery Fee	Judith Mudzengi	16 Mar 2017			1	Requisition Required	1 550.00	1 550.00	0.00	MUD001	Judith Mudzengi	Yes
	0001152	installation of		Dealer Servic	Judith Mudzengi	16 Mar 2017				Requisition Required	1 340.00	1 340.00		SHA001	Belinda Sharman	Yes
	0001152	installation of		Toll Fee	Judith Mudzengi					Requisition Required	12 347.00			SHA001	Belinda Sharman	Ye
	0001247	Third party ser		Delivery Fee	Judith Mudzengi	04 Apr 2017				Requisition Required	150.00	150.00		MUD001	Judith Mudzengi	Yes
	0001247	Third party ser			-					Requisition Required	1 500.00			MUD001	Judith Mudzengi	Ye
	0001286	Project linked t				13 Apr 2017				Requisition Required	500.00	500.00		MUD001	Judith Mudzengi	Ye
	0001307	test4	DEL	Delivery Fee	-	20 Apr 2017	Generated from sales orde	er n		Reguisition Reguired	960.00	960.00		MUD001	Judith Mudzengi	No
	0001309	SP1912_NDS		Delivery Fee	Bianca Du Toit	20 Apr 2017				Requisition Required	150.00	150.00		DUT001	Bianca Du Toit	Ye

1. In this image, the *filter row* has been used to find the work order.

Here you can view the work order and the linked third party service request.

2. You will note that the *Process Status* is *Requisition Required*. You will need to create a service requisition to complete this process.



	Ŧ							Service Requests	- BPO: Ver	sion 2.1.0.64 - E	xample C	ompany						- 0	\times
0	Home	Equ	ipment and	Locations	Contract F	Finance and HR	Inventory	Maintenance a	nd Projects		ng Pro	ocurement	Sales	Service	Reporting	Utilities		-	₽ ×
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								Applied I	Filter : Con	tains([WOCod	e], '1616')							
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¥ 16:	Code 6 🗲	* wo	Description	1	WorkCode	WorkDescription	RequestorNar	me RequiredDate	e Commen	ts	Quantity	ProcessSta	itus	EstimatedPrice	TotalCost	ActualCost	AssignedTo	. AssignedToNam	e Billable
	10	6 Cre	ated for pr	oduction batch.	PRI	Printing	Abigail Milne	16 Aug 2018	Print title	on cover page.	1	Requisition	Required	350.00	350.00	0.00	MIL001	Abigail Milne	No
												2							
×	Contains([WOCod	ie], '1616')																Edit Filter
Open	Vindows •	•																16 Aug 20	18 🔅

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Help v2.5.1.4 - Pg 16 - Printed: 27/06/2024