

SERVICE

WORK ORDERS - THIRD PARTY SERVICE REQUEST

You will need to raise a service request when a supplier is providing a service for work order that needs to be done.

From the service request, you can start a <u>Non-Stock Procurement</u> cycle, i.e. Raise a Purchase Order to the Supplier or Dealer, Non-Stock Goods Received Note and Supplier Invoice.

The list of services available for selection, or that can be requested, are set up in Services.

Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site* where the work needs to be done.
 - The example has *Durban* selected.
- 3. Set the *Status* to *Open*.
- 4. Click on the *row* of the *work order* you wish to add a contractor or third party service request for.
- 5. Click on the *Third Party Services* tile.



Work Orders - Third Party Service Request

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	▶ : WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2	Yes		
Time	· WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2	No		
		IMP	CN0005302	New machine implementation. Installation .	No	New machine implemen	24/01/2022	1	No		
	₩O0006257 ₩O0006257	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	19/01/2022	2	No		
Services		PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3	No		
		REP	CN0005300	Printer displaying error code	No	Printer displaying error	18/01/2022	3	No		
		ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	18/01/2022	3	No		
Third Party Services		REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3	No		
×	WO0006249	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ0000419	1
	H WO0006248	SM		WS - Weekly Service	No		23/11/2021	2	No	PRJ0000420	
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Falls	5 WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ0000418	
	WO0006245	SM		WS - Weekly Service	No		23/11/2021	2	No	PRJ0000417	
	WO0006243	SM		WS - Weekly Service	No		16/11/2021	2	No	PRJ0000413	
Loans	WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	2	No	PRJ0000413	
	WO0006241	SM		WS - Weekly Service	No		16/11/2021	2	No	PRJ0000413	1
	WO0006240	SM		WS - Weekly Service	No		16/11/2021	2	No	PRJ0000416	1
Swap Outs	WO0006238	PR		Test PQ Source Type Work Order	No		14/11/2021	5	No		
	WO0006239	PR		Rollers need replacing	No		11/11/2021	3	No	PRJ0000408	1
	H W00006237	SM		WS - Weekly Service	No		09/11/2021	2	No		

6. The *Service Requests for WO Code [WO number]* screen will be displayed.

ADD THIRD PARTY SERVICE

- 7. Any external service providers that have already been logged against the work order, will display in the data grid.
- 8. Click on Add.

(P)

Short cut key: Right click to display the Process menu list. Click on Add.



Work Orders - Third Party Service Request



9. "The Third Party Services screen will be displayed." on page 2

For a detailed handling of this topic refer to Service Requests - Add Service Request

10. When you have finished adding the third party services request information, click on *Save*.



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Assigned To	Jeff Rivers	•									
Required Date	03/03/2022 -										
Billable	\checkmark										
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Open Windows 🕶						User : JulandaK	28/02/20	022 Ven	sion: 2.5.0.7	Example Co	mpany v2.5.0.7 //

- 11. You will return to the updated *Service Requests for WO Code* screen.
- 12. The *Service Processing* message will display informing you that; *Service Request on WO: [WO number] complete.*
- 13. Click on *OK*.
- 14. Click on *Back* to return to the *Work Order Listing* screen.



â ₹	Service Request	s for WO Code WO0006259	- BPO: Version 2.5.0.7 -	Example Company v2	2.5.0.7			
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▶ ■ WO0006259 Post Contract machine rep	CN0005303	Drum replacement required	HOP001	Hope Works (Pty) Ltd				
	Service Proces	sing	X 6259 complete.					

EDIT THIRD PARTY SERVICE

- 1. From the *Service Request for WO Code [WO number]* screen,
- 2. Click on the *row* of the *work order* you wish to *edit*.

Note that a service request can only be edited in the *Requisition Required* Process Status.

3. Click on *Edit*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.





- 4. When you receive the *Service Request* message to confirm;
 - Are you sure you want to edit this service [service code] on WO [WO number]?
- 5. Click on Yes.

			Sei	vice Re	quests f	or WO Co	ode WO0	006259	- BPO: Ver	sion 2.5.0.	7 - Example		any v2.5.0.						X
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- 6. The *Third Party Services* screen will be displayed.
- 7. Make the necessary changes to the third party service.
- 8. Click on *Save*.

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Open Windows 🔻							User : JulandaK	28/02/2022	Version : 2.5.0.7	Example Cor	npany v2.5.	0.7
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- 9. You will return to the *Service Requests for WO Code* screen.
- 10. When you receive the *Service Processing* message to confirm that;
 - Service Request on WO: [WO code] complete.
- 11. Click on *OK*.



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WO0006259 Post Contract machine re	ep CN0005303	Drum replacement required	HOP001	Hope Works (Pty) Ltd			
	Service Proces	vice Request on WO : WO000	× 6259 complete.				

- 12. The service request screen has been updated with the required changes you have made.
- 13. Click on *Back* to return to the *Work Order Listing* screen.

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DELETE THIRD PARTY SERVICE

The service request can be deleted from the Service Request screen when in the requisition require process status. If the service request has been converted to a Purchase Requisition, then the purchase requisition or purchase order, will need to be cancelled.

- 1. From the Service Requests for WO Code [WO code] screen,
- 2. Click on the *row* of the third party *service request* you wish to *delete*.

Note that a service request can only be deleted in the *Requisition Required* Process Status.

3. Click on *Delete*.

P Short cut key: Right click to display the Process menu list. Click on Delete. W00006259 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7 s for WO Code anufactu • Refresh 2 Durbar Export -04 --0 • 🖬 🛛 • 🖬 🕻 WO0006259 Post Contract machine rep... CN0005303 Drum replacement required HOP001 Hope Works (Pty) Ltd User : JulandaK 28/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7 Open Windows 🔻



- 4. When you receive the *Service Requests* message to confirm;
 - Are you sure you want to remove this service
 - [service code] on WO [WO number]?
- 5. Click on Yes.

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Open Windows 🕶					User : JulandaK	28/02/2022	/ersion : 2.5.0.7 Example Co	ompany v2.5.0.7

- 6. The service request *status* have been updated to *C* (*Closed*).
- 7. You will <u>no longer</u> be able to *Edit* or *Delete* the service request.



Work Orders - Third Party Service Request

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EXPORT

- 1. From the *Service Requests for WO Code [WO number]* screen,
- 2. Click on *Export*.

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- 3. The list of service requests for the work order will be exported to an *Excel Spreadsheet*.
- 4. *Edit* and *Save* the document in Excel as required.
- 5. *Close* the spread sheet to return to BPO.

□ 5 · C · •	Service Requests for WO	Code WO0006259_28-Feb-2022_04	I-37-50 - Excel	Julanda Kessler 🛛 🎴	
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Related Topics

Service Requisition

MNU.072.011