

# SERVICE

## MY WORK - ADD A THIRD PARTY SERVICE REQUEST

You will need to raise an **external** or **Third Party Service Request** when a <u>supplier</u> is required to provide a **service** for a work order.

From this Third Party Service Request, you can start a <u>Non-Stock Pro-</u> <u>curement</u> cycle:

- i. Raise a Purchase Order to the Supplier/Dealer
- ii. Raise a Non-Stock Goods Received Note
- iii. Create a Supplier Invoice.

The list of services you can select and request are set up in **Services**.

Ribbon Access: Service > My Work



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The *My Work* listing screen will be displayed.



#### <u>Either</u>

- Click on the *row selector* in front of the *work order* that you wish to log a *third party* or *external service request* for.
- Click on *Edit*.



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#### • Click on the *Third Party Services* tile.

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#### <u>Or</u>

In the My Work listing screen,

- *Right click* anywhere in the *row* of the *work order* where you wish to log an *external service* request.
- A *Process* menu will pop up.
- Click on *Service Requests* External Service Requests.

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Either process will bring you to the *Service Requests for WO Code* [] screen.

• Click on Add.



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• The *Third Party Services* screen will be displayed.



- Work Reference: Click on the search button and select from the pop up screen, the service required.
- Work Description: The service description will populate with the description of the service selected in the previous step.
  - You can update this field with any additional information for the supplier, e.g. serial number - as this detail will pull through to the purchase order.
- Quantity: The quantity will auto populate as 1 but you can type in the quantity required, e.g. **3**
- **Price:** The price will auto populate with what's set up on the selected sevice but you can type in another price if applicable.
- **Required Date:** This will default to the current date.
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Assigned To:** This will populate with the person currently logged on to the system.
  - You can click on the drop-down arrow and select an alternative person responsible for arranging the service, if required.
- Is Billable: Select this option if the service is billable.
  - Note: This will be set to 'billable' by default, unless the service is linked to a contract inclusion.
- **Comment:** Type in a comment regarding this external service request, if required.



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• When you have finished inputting the third party service request details, click on *Save*.

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- You will return to the *Service Requests for WO Code []* screen.
- A *Service Processing* message box will pop up informing you that;
  - Service Request on WO: [] complete.
- Click on OK.





• You can now *view* the newly added service request in this screen.



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 $\checkmark$  Note that from BPO2 v2.5.0.14, you have the ability to add the same ser-

vice (non-stock item) more than once to a purchase requisition, and change the item description to differentiate between them.

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