

# SERVICE

## CALLS – REQUEST A PART FROM STORE

**Parts Requests** are raised in order to notify stores that stock is required for work to be done. The stores person can then pick and issue the stock or, if necessary, raise a purchase requisition for stock to be bought. A part request may be logged directly from a **Call**.

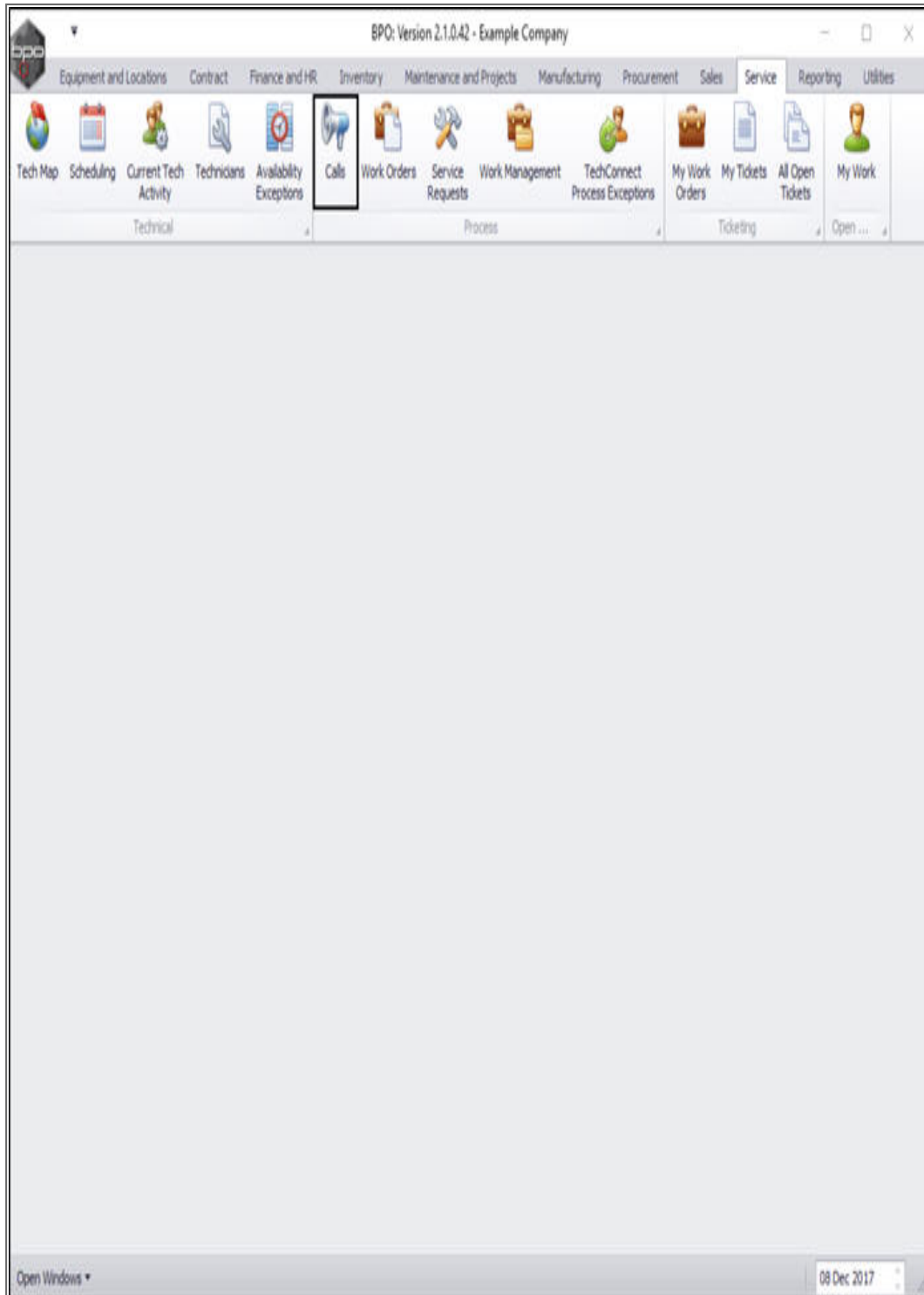
Depending on your company's configuration, the part request may need to be authorised before stores will receive the request and the stock can be issued.

**One** part request must be logged for each **part** required.

---

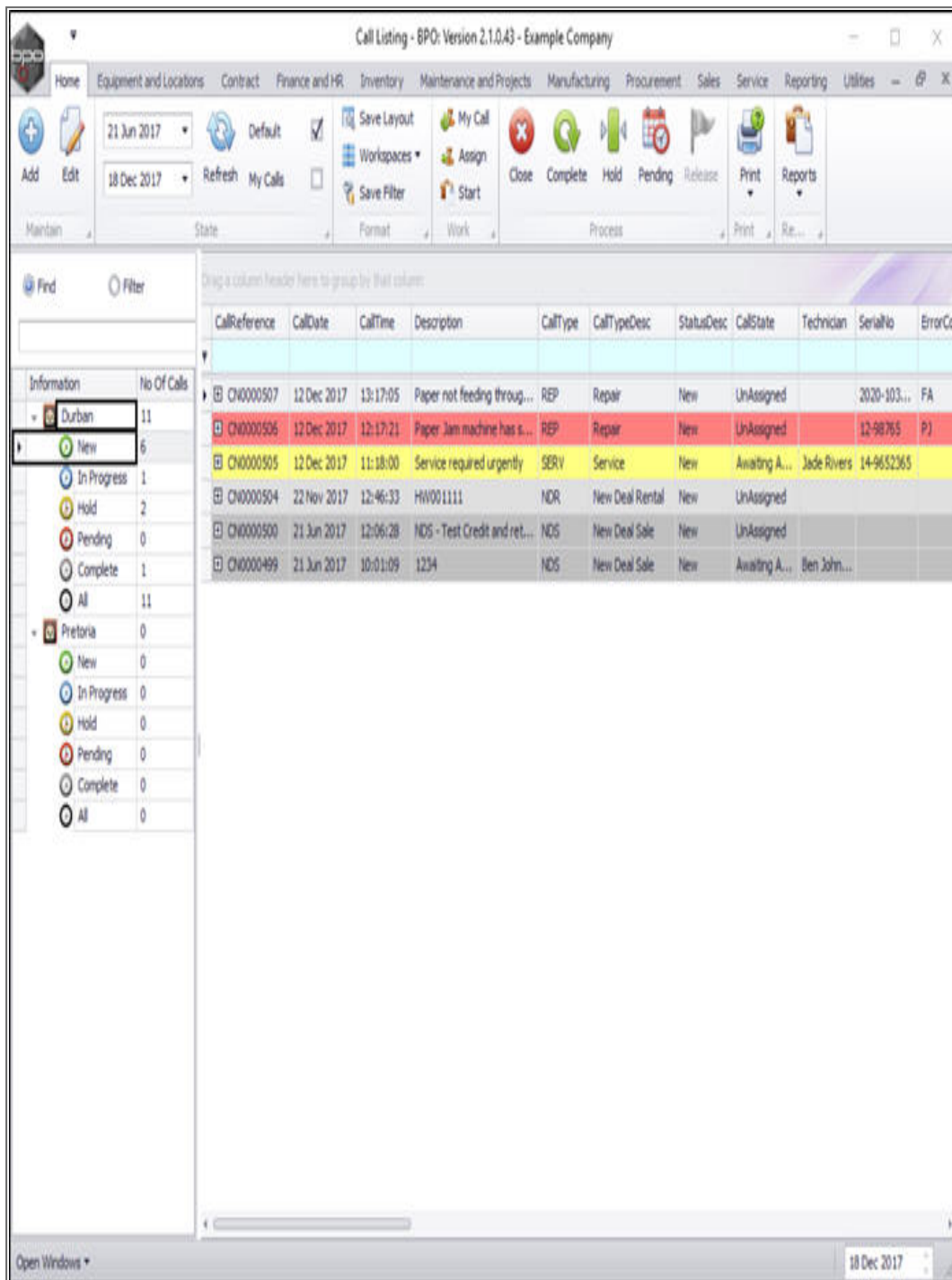
**Ribbon Access:** *Service > Calls*

---



The ***Call Listing*** screen will be displayed.

- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.



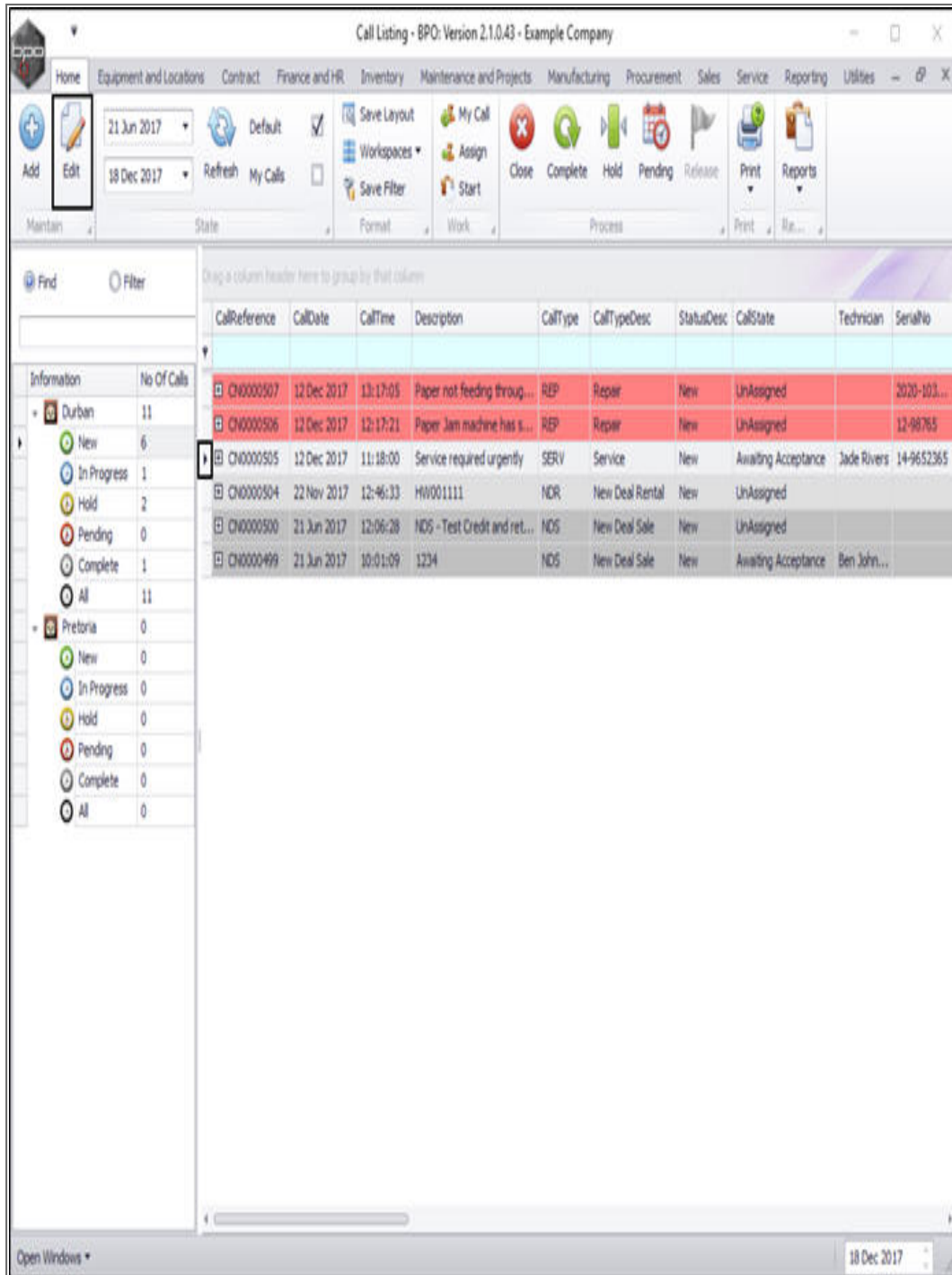
The screenshot shows the 'Call Listing - BPO: Version 2.1.0.43 - Example Company' application. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Save Layout, My Call, Assign, Close, Complete, Hold, Pending, Release, Print, and Reports. A sidebar on the left contains a 'Find' and 'Filter' section with a tree view for 'Information' and 'No Of Calls'. The tree view shows a hierarchy for 'Durban' (11 calls) and 'New' (6 calls). The main area displays a table of call records with columns: CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, SerialNo, and ErrorCod.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo	ErrorCod
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...	FA
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765	PJ
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting A...	Jade Rivers	14-9652365	
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned			
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned			
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting A...	Ben John...		

## SELECT THE CALL

---

- Click on the *row selector* in front of the *call* you wish to *request parts* for.
- Click on *Edit*.



CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding through...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW0011111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	

- The **Call Maintenance: Call ref. - [ ]** screen will be displayed.

## SELECT THE WORK ORDER (METHOD 1)

- Click on the **Work Orders** tile.

Call maintenance : Call ref. : CN0000505 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Close Complete Assign Hold Pending Release Reassign Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links  
Enter text to search...

Functions

- Work Orders
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info
- For Contract

Customer: Westwood Dynamic

Contact: Jason March

Contact No.: 031 789 4561

Address: 965 Barlet Str West Dunes

Call Type: Service

Error Code:

Description: Service required urgently

Call Date Time: 12 Dec 2017 11:18:00

Priority: 3

SLA:

Date Required: 15 Dec 2017

Order No:

Logged By: AbigailH

Status: N - New

Optional No:

Relates To:

ReferenceType	ReferenceNo
Serial No	14-9652365
Prior Call Reference	
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Closure Details:

Action:

Closure Date Time: 00:00:00

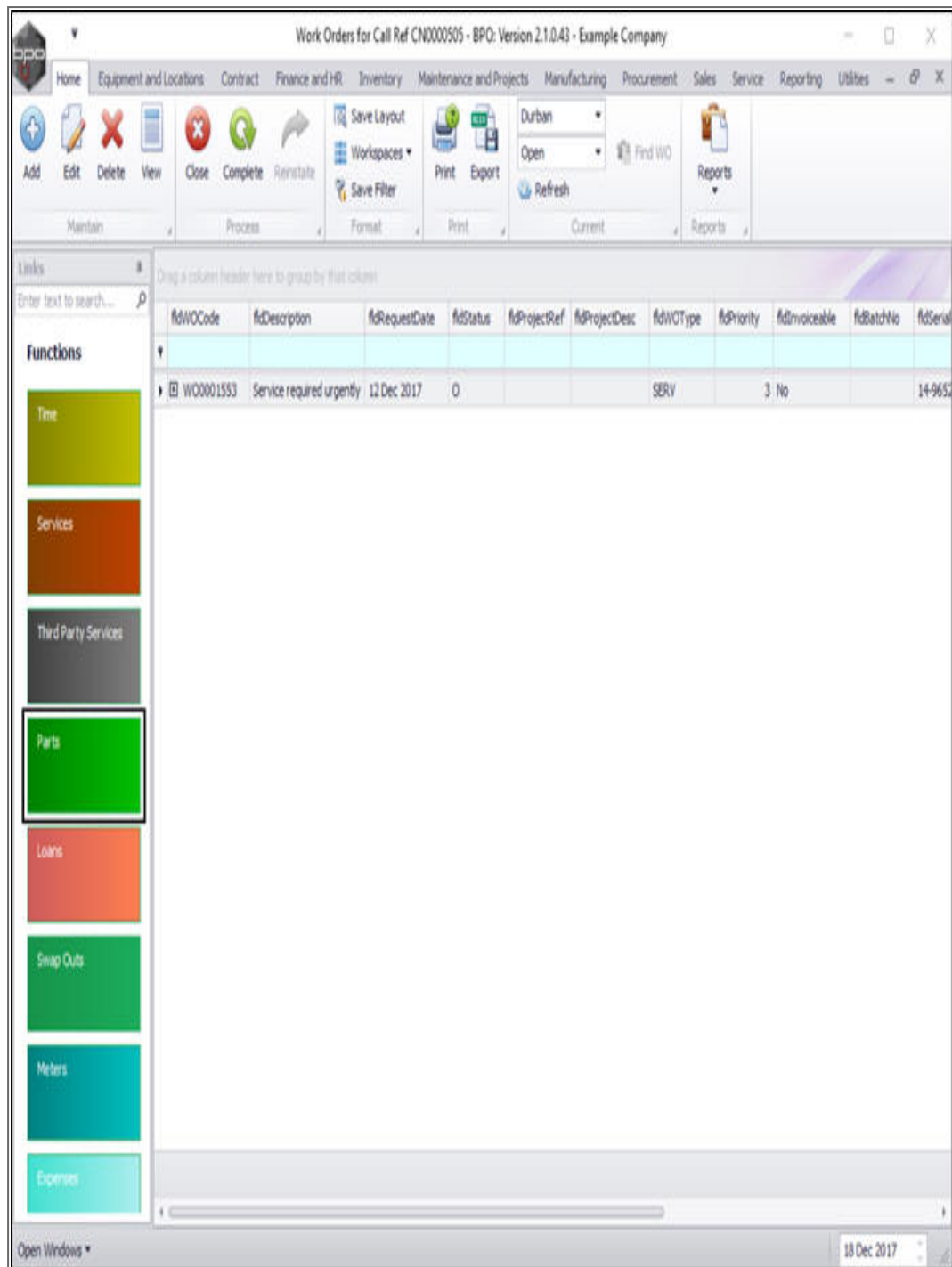
Closed By:

Meters

Open Windows

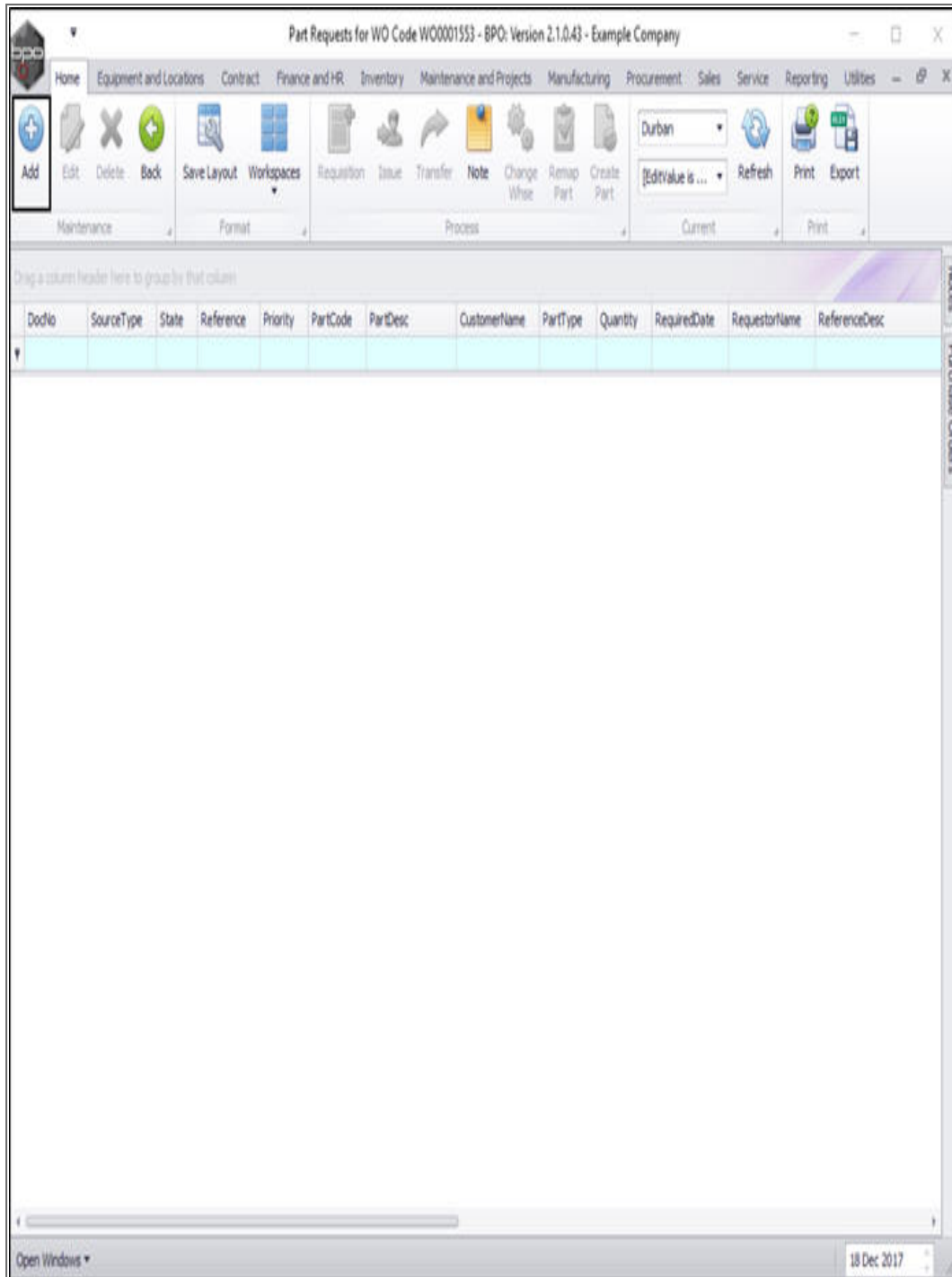
18 Dec 2017

- The ***Work Orders for Call Ref [ ]*** screen will be displayed.
- If there is more than one work order in this screen, select the work order that you wish to attach the part request to.
- Click on the ***Parts*** tile.



- The **Part Requests for WO Code [ ]** screen will be displayed.
- Click on **Add**.

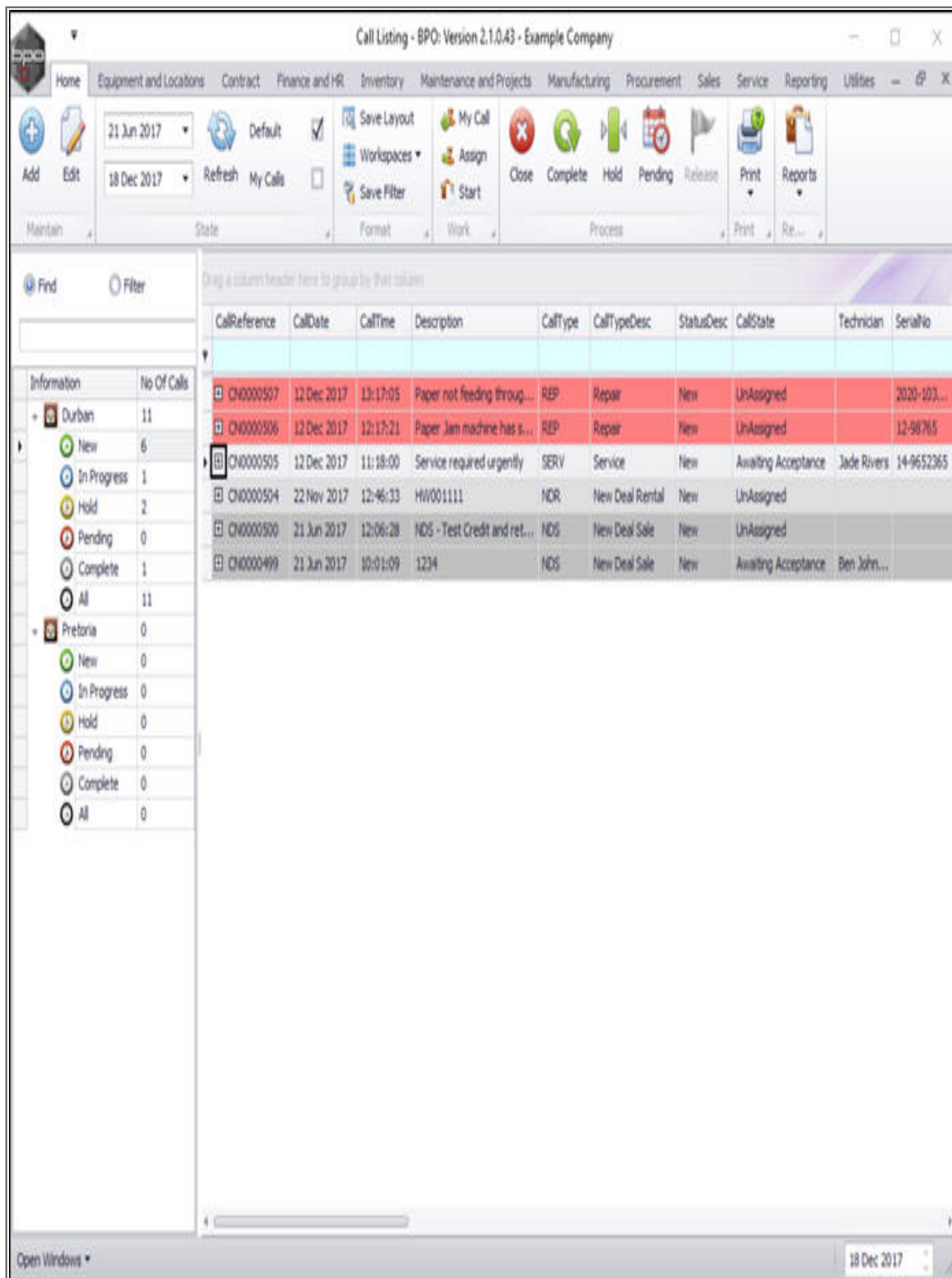




## SELECT THE WORK ORDER (METHOD 2)

You can also reach this point by following a slightly different process.

- In the **Call Listing** screen,
- Click on the **expand** icon in the row of the call that you wish to request parts against.



Call Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit 21 Jun 2017 18 Dec 2017 Default Refresh My Calls Save Layout Workspaces Save Filter My Call Assign Start Close Complete Hold Pending Release Print Reports

Find Filter

Information No Of Calls

- Durban 11
  - New 6
  - In Progress 1
  - Hold 2
  - Pending 0
  - Complete 1
  - All 11
- Pretoria 0
  - New 0
  - In Progress 0
  - Hold 0
  - Pending 0
  - Complete 0
  - All 0

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	

Open Windows 18 Dec 2017

- The **Work Orders** data grid will be expanded.

Call Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit 21 Jun 2017 18 Dec 2017 Refresh My Calls Save Layout Workspaces Save Filter

Maintain State Format Work Process Print Re...

Find Filter

Information No Of Calls

- Durban 11
  - New 6
  - In Progress 1
  - Hold 2
  - Pending 0
  - Complete 1
  - All 11
- Pretoria 0
  - New 0
  - In Progress 0
  - Hold 0
  - Pending 0
  - Complete 0
  - All 0

Drag a column header here to group by that column:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365

Work Orders Call Assignments

fdWOCode	fdDescription	fdSiteName	fdWOType	fdStatus	fdStatusDescription	fdPriority	fdWorkPriority	fdRequestDate	fdR...
WO0001553	Service required urgently	Durban	SERV	O	Open	3	0.00	12 Dec 2017	11:

CH0000504 22 Nov 2017 12:46:33 HW001111 NDR New Deal Rental New UnAssigned

CH0000500 21 Jun 2017 12:06:28 NDS - Test Credit and ret... NDS New Deal Sale New UnAssigned

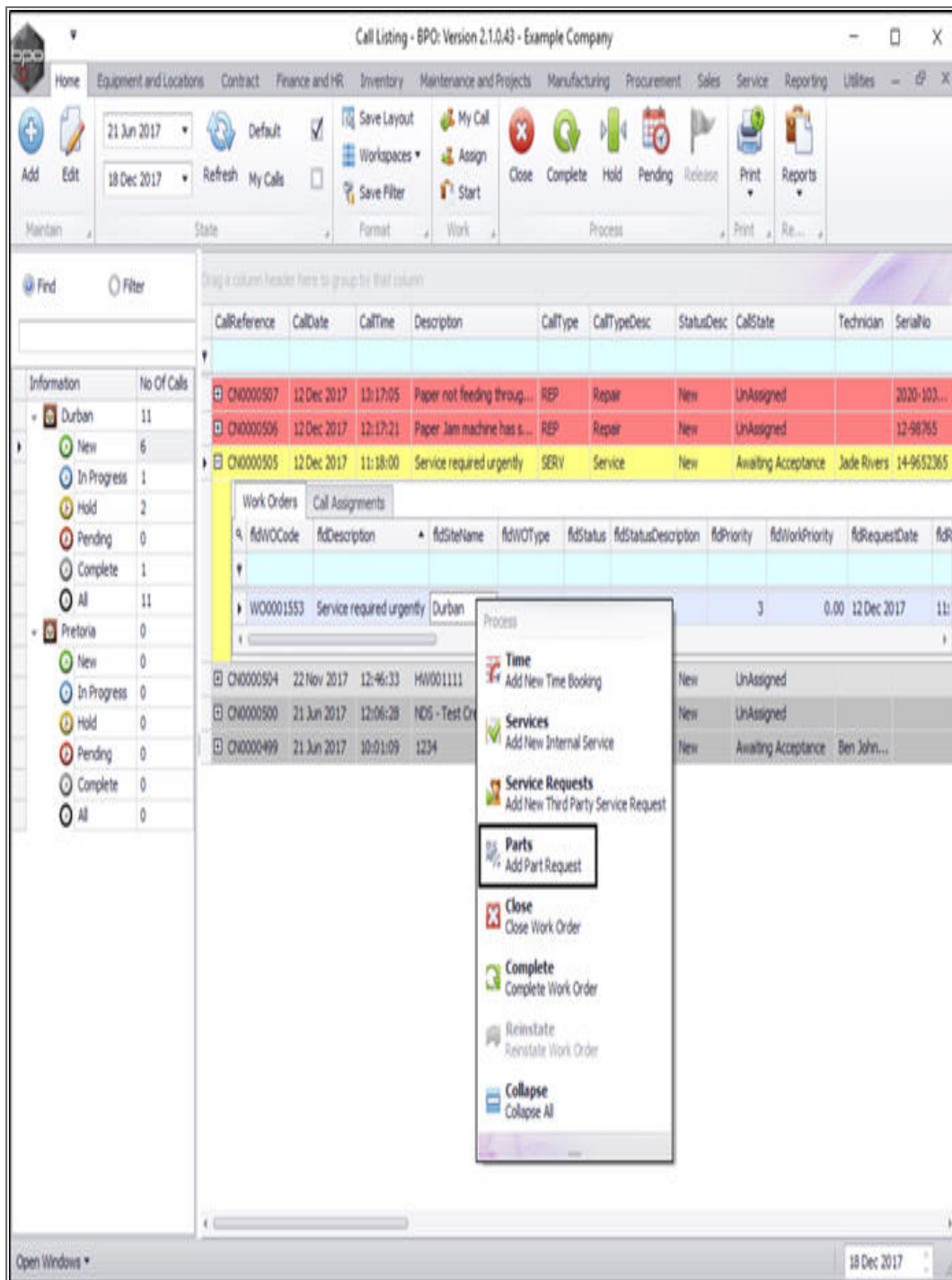
CH0000499 21 Jun 2017 10:01:09 1234 NDS New Deal Sale New Awaiting Acceptance Ben John...

Open Windows 18 Dec 2017

## ADD THE PART REQUEST

---

- **Right click** anywhere in the **row** of the work order that you wish to link the Part Request to.
- A **Process** menu will pop up.
- Click on **Parts Add Part Request** in this menu.

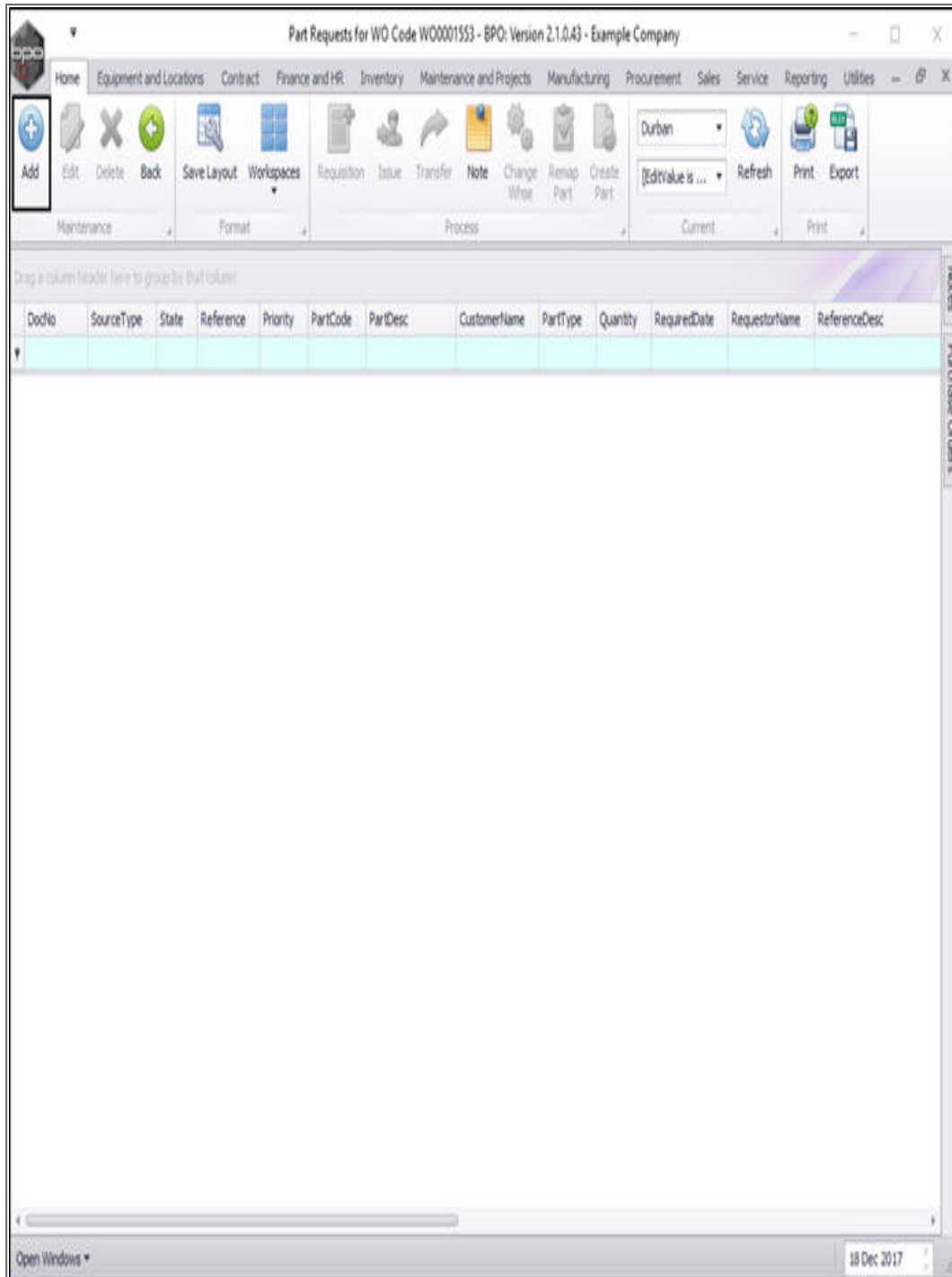


The screenshot shows the CO3 BPO software interface. The main window is titled "Call Listing - BPO: Version 2.1.0.43 - Example Company". The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with various icons for actions like Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area displays a table of call records with columns: CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and SerialNo. A left sidebar shows a filter tree with categories like Information, No Of Calls, and a list of call states (New, In Progress, Hold, Pending, Complete, All) with their respective counts. A right sidebar shows a list of work orders with columns: fIdWOCode, fIdDescription, fIdSiteName, fIdWOType, fIdStatus, fIdStatusDescription, fIdPriority, fIdWorkPriority, fIdRequestDate, and fIdRequester. A context menu is open over the work order WO0001553, showing options like Time, Services, Service Requests, Parts, Close, Complete, Reinstate, and Collapse. The "Parts" option is highlighted, and a sub-menu is visible with the option "Add Part Request".

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365

fIdWOCode	fIdDescription	fIdSiteName	fIdWOType	fIdStatus	fIdStatusDescription	fIdPriority	fIdWorkPriority	fIdRequestDate	fIdRequester
WO0001553	Service required urgently	Durban				3	0.00	12 Dec 2017	11:18:00

- The **Part Requests for WO Code [ ]** screen will be displayed.
- Click on **Add**.



You have navigated to the same **Part Requests** screen.

There are 2 options:

1. Select a BOM (Bill of Materials) Part Request
2. Select a single item Part Request

## REQUEST FROM BOM

---


**Request from BOM:** With this selection; when you search for the part number, BPO will only bring up a list of parts that 'belong' to this machine. For this process, a Part List BOM must be set up. View [Bill of Materials](#) for more details.

- **BOM or Parts:** Click on the **BOM** radio button.
- **Work Order:** This will be auto populated with the work order number that you initially selected.
- **Part:** Click on the search button and select the part required from the list.
  - **Note:** See below **Yield Controlled Parts** for explanation regarding the message box that will pop up here.
- **Description:** This will auto populate as the part is selected.
- **Quantity:** Type in the quantity required.
- **Warehouse:** This will auto populate with the **default site warehouse** set up on the part Click on the search button and select an alternative warehouse, if required.
- **Required Date:** This will auto populate with the current date but you can click on the drop arrow and use the calendar function to select a different date if required.
- **Assigned To:** This will auto populate with the person currently creating the part request but you can click

on the drop-down arrow and select a different person if required.



- **Requested By:** This will auto populate with the person currently creating the part request but you can click on the drop-down arrow and select a different person if required.
- **Comments:** Type in any comments as required.
- **Billable:** Click on this check box if the part is billable.
  - **Note:** This will be set to billable by default unless the part is linked to the contract as an inclusion.
  - Only stock items can be marked as billable, asset and loan requests will **not** be billable.
- **Under Warranty:** Click on the check box in order to note whether the item replaced is under warranty.
  - **Note:** This does not process the item as a warranty claim part. Refer to the Introduction in the **Warranty Claims** manual for more details.





Part Requests - BPO: Version 2.1.0.43 - Example Company

Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities

Save

Back

Process

BOM

Parts

Work Order

W00001553

Part

Description

Quantity

1

Warehouse

Required Date

18 Dec 2017

Assigned To

Sarah Milder

Requested By

Sarah Milder

Comment

Billable

☐

Is Loan

☐

Under Warranty

☐

Open Windows

18 Dec 2017

## REQUEST FROM PART LIST

---

**Request from Parts:** With this selection, when you search for the part number, BPO will bring up all part numbers entered onto the system.

- **BOM or Parts:** Click on the **Parts** radio button.
- **Work Order:** This will be auto populated with the work order that you initially selected.
- **Part:** Click on the search button and select the part required from the list.
  - **Note:** See below [Yield Controlled Parts](#) for explanation regarding the message box that will pop up here.
- **Description:** This will auto populate as the part is selected.
- **Quantity:** Type in the quantity required.
- **Warehouse:** Click on the search button and select the warehouse.
- **Required Date:** This will auto populate with the current date but you can click on the drop arrow and use the calendar function to select a different date if required.
- **Assigned To:** This will auto populate with the person currently creating the part request but you can click on the drop-down arrow and select a different person if required.
- **Comments:** Type in any comments as required.
- **Billable:** Click on this check box if the part is billable.
  - **Note:** This will be set to billable by default unless the part is linked to the contract as

an inclusion.

- Only stock items can be marked as billable, asset and loan requests will **not** be billable.
- **Under Warranty:** Click on the check box in order to note whether the item replaced is under warranty.
  - **Note:** This does not process the item as a warranty claim part. View [Warranty Claims Introduction](#) for more details.

Part Requests - BPO: Version 2.1.0.43 - Example Company

Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities

Save Back

Process

BOM

Parts

Work Order

WO0001553

Part

Description

Quantity

1

Warehouse

Required Date

18 Dec 2017

Assigned To

Sarah Milder

Requested By

Sarah Milder

Comment

Billable

Is Loan

Under Warranty

Open Windows



18 Dec 2017

## YIELD CONTROLLED PARTS

**Note:** For more information refer to [Part Yield Config.](#)

- On selecting the part, a ***Yield Tracking*** message box will pop up giving you the ***Expected Yield*** and the ***Current Yield***.
- If the current yield is more than the expected yield, the system is not going to stop the part processing. You need to follow up on this accordingly.

Part Request Maintenance

Save Cancel

Parts Requested:

Select From

☐ BOM
 ☒ All Parts

Part No.

SP19-147K

Part Description

Black Toner SP1919

Quantity

Warehouse

Main Warehouse

Required Date

2014-07-28

Assigned To

Requested By

Belinda Sharman

Comments

Is Billable

☒

Under Warranty


☐

all ref. - CN0000044

Relates to:

ReferenceType	ReferenceNo
Serial No	19-90201
Prior Call Reference	
Contract No	CO0000006
Location	
Project Reference	
Quote Reference	

Yield Tracking



This part is yield controlled and the expected yield is 5000. The current yield is 3324.

Ok

WOCCode

Description

StatusDel

Alterna

W00000191	1 black toner for collector	Open	
-----------	-----------------------------	------	--

Hold Events

Pending Events

Quotes

Orders

Invoices

Cr Notes

Loan Units

Service Contracts

Time

Expenses

Travel

Swap Outs

Add

Edit

Delete

fldRequestStatus	PartCode	PartDesc	fldPartType	Warehouse	NLF

- If a part has a yield configured, but no meter reading has been logged on the call, a ***Yield Tracking*** warning message will pop up informing you that;
  - ***Warning! This part is yield controlled but no meter reading has been captured on the call [ ].***
- Click on ***Ok***.
- Ensure the **meter reading is added**, **save** the call, then begin the ***part request*** process again.

Part Requests - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

BOM Parts

Work Order WO0001553

Part 147-888544

Yield Tracking

Warning! This part is yield controlled but no meter reading has been captured on the call CN0000505.

OK

Assigned To Sarah Milder

Requested By Sarah Milder

Comment


Billable ☐ Is Loan ☐

Under Warranty ☐

Open Windows 18 Dec 2017

- When you have finished adding the details to the Part Requests screen, click on **Save**.





Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save

Back

Process

Part Requests - BPO: Version 2.1.0.43 - Example Company

BOM

Parts

Work Order

W000015533

Part

147-808544

p

Description

K147 Black toner

Quantity

1

Warehouse

Main Warehouse

p

Required Date

19 Dec 2017

Assigned To

Sarah Milder

Requested By

Sarah Milder

Comment

Billable

☒

Is Loan

☐

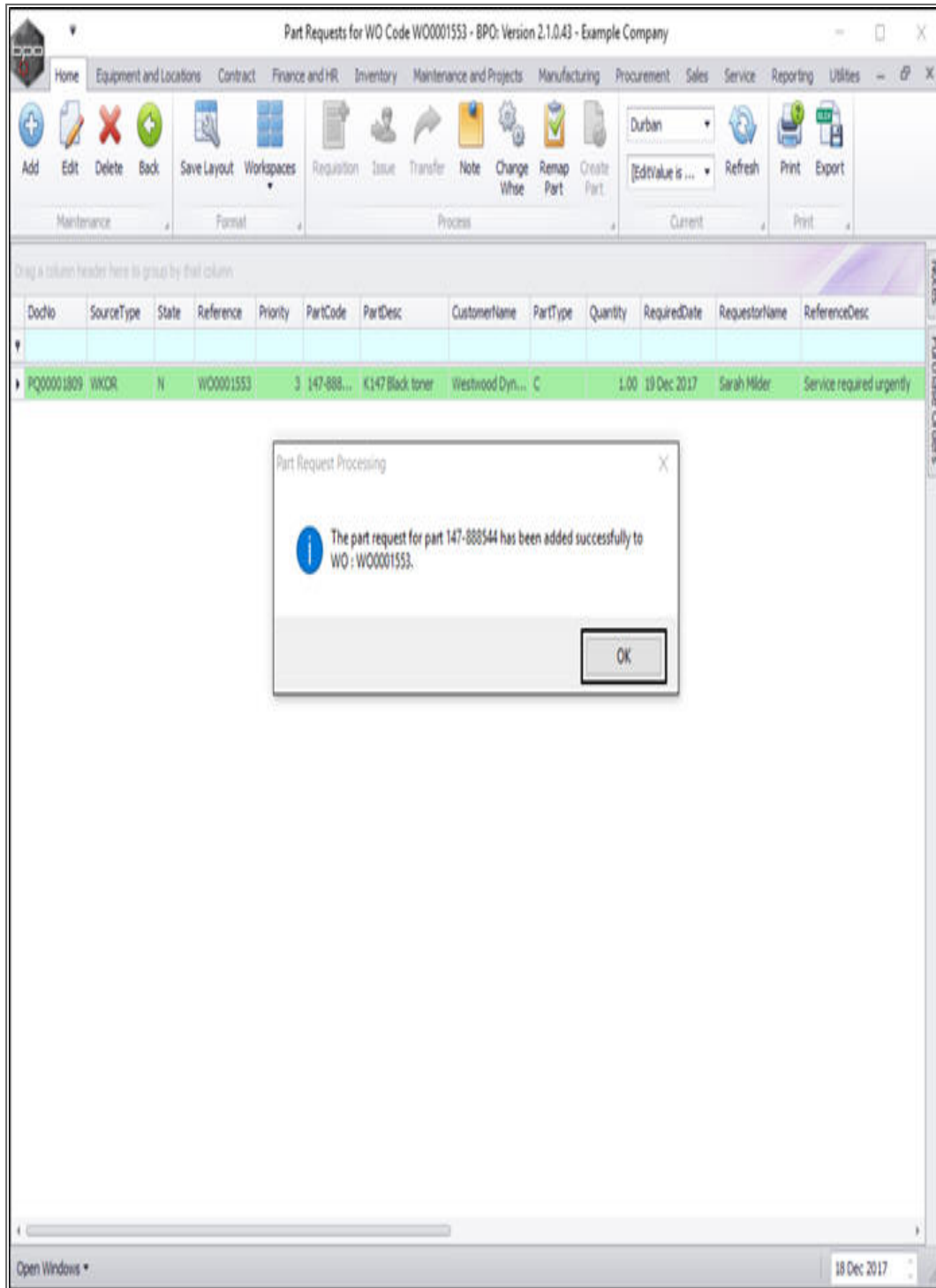
Under Warranty

☐

Open Windows

18 Dec 2017

- You will return to the ***Part Requests for WO Code [ ]*** screen.
- A ***Part Request Processing*** message box will pop up informing you that;
  - ***The Part Request for part [ ] has been added successfully to WO: [ ].***
- Click on ***OK***.



- You can now **view** the details of the **part request** in this screen.

Part Requests for WO Code WO0001553 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Issue Transfer Note Change Whse Remap Part Create Part

Durban [Edit Value is ...] Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

DodNo	SourceType	State	Reference	Priority	PartCode	PartDesc	CustomerName	PartType	Quantity	RequiredDate	RequestorName	ReferenceDesc	RequestAge
PQ00001809	WMGR	N	WO0001553	3	147-888544	K147 Black toner	Westwood Dynamic	C	1.00	19 Dec 2017	Sarah Milder	Service required urgently	

Open Windows 18 Dec 2017

You can now follow the process to **Issue the Part from the Call**.

MNU.122.008