

We are currently updating our site; thank you for your patience.

SERVICE

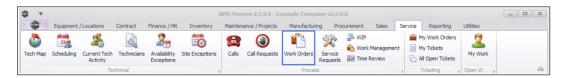
WORK ORDERS - PART REQUESTS

Parts requests are raised 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 purchased.

Part requests can be auto authorised or need to be authorised by a technical or service manager before stores will receive the request.

Refer to **Work Orders - Understanding Part Request Types** for more information relating to Part Request Types.

Ribbon Access: Service > Work Orders



- 1. The Work Orders Listing screen will be displayed.
- 2. Select the **Site** where the work order was assigned.
 - The example has **Durban** selected.
- 3. Set the **Status** to **Open**.
- 4. Click on the **row** of the **work order** you wish to raise a part request for.
- 5. Click on the **Parts** tile.



Work Orders - Part Requests

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	E ₩00006257	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	19/01/2022		No		
Services		PR	CN0005301	Replace part - current faulty	No	Replace part - current			No		
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	₩000006251	REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro			No		
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	WO0006243	SM		WS - Weekly Service	No		16/11/2021	-	No	PRJ0000413	PRJ408
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	WO0006240	SM		WS - Weekly Service	No		16/11/2021		No	PRJ0000416	Second
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	WO0006239	PR		Rollers need replacing	No		11/11/2021	3	No	PR30000408	Mainten
	WQ0006237	SM		WS - Weekly Service	No		09/11/2021		No		
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- The Part Requests for WO Code [work order code] screen will be displayed.
- 7. Part Requests that have already been created for the Work Order will display in the grid area.

ADD PARTS REQUEST

8. Click on Add.

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



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9. The **Parts Request** screen will be displayed.

REQUEST FROM BILL OF MATERIAL

When searching for the part number, the system will <u>only</u> display a list of parts that <u>belong</u> to the selected machine. For this process, a Part List BOM must be set up.

Refer to **BOMs - Introduction to BOMs** for a detailed handling of the topic.

- **BOM:** Click to select the BOM radio button.
- Work Order: The work order field will auto populate with the work order number you have selected.
- Part: Click on the search button to display the Select a part for this work order screen.
 - i. Click on the **row** of the **BOM** part you wish to add to this part request.
 - ii. Click on OK.



Note that only a list of <u>BOM parts</u> that belong to this machine will be displayed.

Home	Equipment / Locations Contract	Finance / HR Inventor	Mainte	nance / Projects	Manufacturing Proc	urement Sales	Service	Reporting	Utilities	_ 8
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				1414-147K	SP1414 MFC		15.00		С	Toners
proval Manager				147-888544	K147 Black toner		15.00		С	Toners
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nuer warrancy				500-147K	SP500 Black Toner		15.00	A	с	Toners
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- **Description:** The description for the BOM part you have selected will auto populate the field.
- **Quantity:** Type in or use the **arrow** indicators to select the quantity required.
- Warehouse: Click on the search button to select the warehouse where the BOM part needs to be requested from.
- **Required Date:** This field will auto populate with the current date. Click to type in or use the down **arrow** to select the date the part is required, using the calendar function.
- Assigned To: This field will auto populate with the name of the person currently creating the BOM part request. Click on the down **arrow** to select the person to be assigned to the BOM part request.
- **Requested By:** This field will auto populate with the name of the person currently creating the BOM part request. Click on the



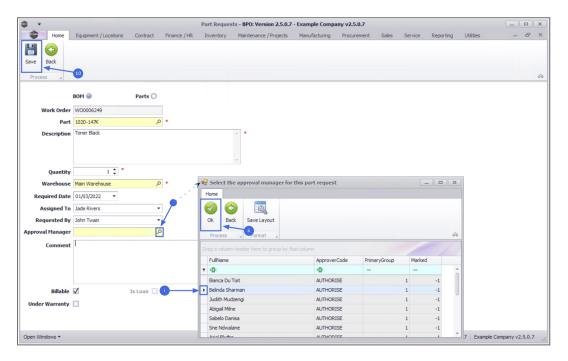
down **arrow** to select the person who requested the BOM part from the drop-down list.

Approval Manager

The ability to select the approval manager is dependent on whether approval is required as specified by the Requisition Value for the part, or whether Auto Approval has been configured for your Company. If you are unable to search for the approval manager (search button is greyed out), then the part request will be auto approved and can be issued, when saved.

Refer to **Company - Edit Purchasing Centre** for more information about the Auto Approve Request and setting the Part Request Value for authorisation.

- Approval Manager: Click on the Search button to display the Select the approval manager for this part request screen.
 - i. Select the **row** of the Approval Manager for the part request.
 - ii. Click on OK.



Help v2024.5.0.7/1.0 - Pg 5 - Printed: 21/08/2024



- **Comments:** Click to type in the comments related to the part request, if required.
- Is Billable: This field will be set to billable by default, unless the part is linked to a contract and is therefore included. Select or deselect this option as required.

Note that only stock items can be marked as billable, asset and loan requests will not be billable.

• Under Warranty: Tick to select the check box if the item being replaced is under warranty. This does not process the item as a warranty claim part.

Refer to Add a Warranty Claim for more information related to Warranties.

 When you have finished adding the BOM part request details, click on Save.

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- 11. You will return to the Part Requests for WO Code screen.
- 12. When you receive the **Part Request Processing** message to inform that;
 - The part request for part [part code] has been added successfully to WO: [WO number].
- 13. Click on OK.

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14. The request can be viewed with any other requests that have been logged against the work order.

Note that this information can be used to keep track of requests, by noting request and issue information.

15. Click on **Back** to return to the **Work Order Listing** screen.



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REQUEST FROM PART LIST

When you search for the part number, the system will display <u>all</u> part numbers.

- Parts: Click to select the Parts radio button.
- Work Order: The work order number you have selected will auto populate the field.
- Part: Click on the search button to display the Select a part for this work order screen.
 - i. Click on the **row** of the part you are requesting
 - ii. Click on **OK**.



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Assigned To	Julanda Kessler	-		1020-147C	Toner Cyan	15.00	A C	Toners	
Requested By		- 1		1020-147K	Toner Black	15.00	A C	Toners	
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oproval Manager				1020-147Y	Toner Yellow	15.00		Toners	
Comment			<u>_</u>	1020-478	Staple Unit	15.00		Accessories	
				102-7854	Network cable	15.00		Spare Parts	
			-	12-098765	SP 19-12 Black Toner	15.00		Toners	
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				1458-96523 147258	K147 Kyocera Colour Copier		A C		ctic

- **Description:** The description for the part you have selected will auto populate the field.
- **Quantity:** Type in or use the **arrow** indicators to select the quantity required.
- Warehouse: Click on the **search** button to select the warehouse where the part is being requested from.
- **Required Date:** This field will auto populate with the current date. Click to type in or use the down arrow to select the date the part is required, using the calendar function.
- Assigned To: This field will auto populate with the name of the person currently creating the part request. Click on the down **arrow** to select the person to be assigned to the part request.
- **Requested By:** This field will auto populate with the name of the person currently creating the part request. Click on the down **arrow** to select the person who requested the part from the drop-down list.



Approval Manager

The ability to select the approval manager is dependent on whether approval is required as specified by the Requisition Value for the part, or whether Auto Approval has been configured for your Company. If you are unable to search for the approval manager (search button is greyed out), then the part request will be auto approved and can be issued, when saved.

Refer to **Company - Edit Purchasing Centre** for more information about the Auto Approve Request and setting the Part Request Value for authorisation.

- Approved Manager: Click on the Search button to display the Select the approval manager for this part request screen.
 - i. Select the **row** of the Approval Manager for the part request.
 - ii. Click on OK.

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• **Comments:** Click to type in the comments related to the part request, if required.



• Is Billable: This field will be set to billable by default, unless the part is linked to a contract and is therefore included. Select or deselect this option as required.

Note that only stock items can be marked as billable, asset and loan requests will not be billable.

• Under Warranty: Tick to select the check box if the item being replaced is under warranty. This does not process the item as a warranty claim part.

Refer to Add a Warranty Claim for more information related to Warranties.

 When you have finished adding the details of this part request, click on Save.

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- 2. You will return to the Part Requests for WO Code screen.
- 3. When you receive the **Part Request Processing** message to confirm that;
 - The part request for part [part code] has been added successfully to WO: [WO number].
- 4. Click on OK.

14	v			2		Part Request	s for WO Co	de WOOD	006249 - BPO:	Version 2.5.0.7 - E	cample Com	pany v	/2.5.0.7						X
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5. The request can be viewed with any other requests that have been logged against the work order.

Note that this information can be used to keep track of requests, by noting request and issue information.

6. Click on **Back** to return to the **Work Order Listing** screen.



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EDIT PART REQUEST

- 1. From the **Parts Requests for WO Code** [work order code] screen.
- 2. Click on the **row** of the part request you wish to edit.
- 3. Click on **Edit**.

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

- 4. When you receive the **Part Request** message to confirm;
 - Are you sure you want to edit this part request [part

request no] on [work order number]?

5. Click on Yes.



D =				6	-		Part Request	s for WO Co	de WOOd	006249 - BPO:	Version 2.5.0.7 - Ex	ample Com	pany v	2.5.0.7					
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- 6. The **Part Requests** screen will be displayed.
- 7. Make the required changes to the BOM part or part request screen as required.

APPROVAL MANAGER

- 8. Click on the **search** button to display the **Select the approval manager** for this part request.
- 9. Click on the **row** of the approval manager responsible for the part request.
- 10. Click on OK.



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11. When you have completed all the required changes, click on **Save**.

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- 12. You will return to the Part Requests for WO screen.
- 13. When you receive the **Part Request Processing** message to confirm;
 - The part request for part [part code] has been saved successfully to WO: [work order code].
- 14. Click on **OK**.

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DELETE PART REQUEST

- 1. From the **Parts Requests for WO Code** [work order code] screen.
- 2. Click on the **row** of the part request you wish to remove.
- 3. Click on **Delete**.

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

- 4. When you receive the **Part Request** message to confirm;
 - Are you sure you want to remove this part request [part

request no] on WO [work order code]?

5. Click on Yes.



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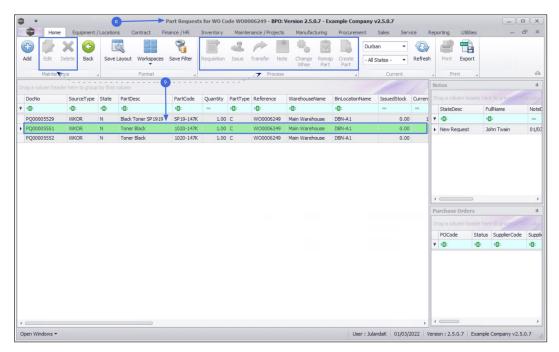
If there are more than one item linked to the part request, then the system will give you the option to remove either <u>all</u> the items on the request, or only the <u>selected</u> item.

- 6. When you receive the **Remove parts request** message to confirm;
 - Do you want to remove only this part request item?
- 7. Click Yes to remove the selected item only or
 - Click on **No** to remove <u>all the items</u> linked to the part request.



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- 8. You will return to the **Part Requests for WO Code** screen.
- Note that the part request that you have Deleted will be unavailable for further Editing or Deleting as well as the part request process.

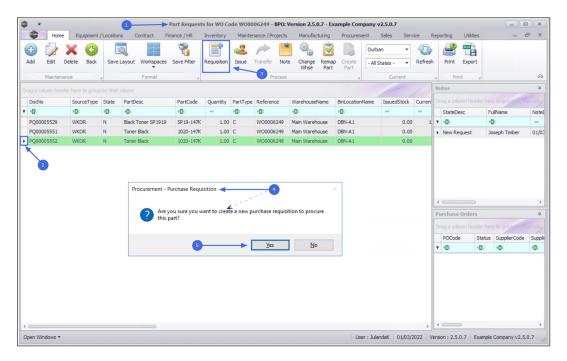




REQUISITION

A purchase requisition can be created directly from the Part Requests for Work Order screen. This process can be used when there is no stock available in the company warehouse(s) and you wish to buy stock specifically for the part request.

- 1. From the Part Request for WO Code [work order code] screen,
- 2. Click on the **row** of the part request you wish to requisition.
- 3. Click on **Requisition**.
- 4. When you receive the **Procurement Purchase Requisition** message to confirm;
 - Are you sure you want to create a new purchase requisition to procure this part?
- 5. Click on Yes.



 Next you will receive the Procurement - Service Request message to confirm;



- A new purchase requisition, number [purchase requisition number] has been created. Do you want to view it?
- 7. Click on Yes to view the purchase requisition, or
 - No to return to the Part Requests for WO Code screen.

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VIEW PURCHASE REQUISITION

- 8. The **Purchase Requisition Listing** screen will be displayed.
- 9. The new purchase requisition will be selected.
- 10. Click on View.



Work Orders - Part Requests

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PR0000681	MAINT	N	Julanda	Kessler	450.00		04/11/2021	13:18:34			Yes			
B PR0000682	MAINT	N	Julanda	Kessler	800.00		04/11/2021	13:26:43			Yes			
PR0000683	MAINT	N	Julanda	Kessler	150.00	172.50	04/11/2021	13:38:01			Yes			
PR0000684	MAINT	N	Abigail	Milne	0.00	0.00	08/11/2021	10:38:23			No	OFF001	Office Supplies U	J
PR0000685	MAINT	N	Abigail	Milne	0.00	0.00	08/11/2021	14:04:24			No	BIG0001	Big Bargains	
PR0000686	MAINT	N	Abigail	Milne	0.00	0.00	08/11/2021	14:22:50			No			
PR0000687	MAINT	N	Abigail	Milne	459.26	528.15	10/11/2021	09:13:26			Yes	HOP001	Hope Works (Pty	i
PR0000688	MAINT	N	Abigail	Milne	459.26	528.15	10/11/2021	09:37:31			Yes	HOP001	Hope Works (Pty	ÿ
PR0000689	MAINT	N	Abigail	Milne	459.26	528.15	10/11/2021	09:47:40			Yes	HOP001	Hope Works (Pty	Ŷ
PR0000690	MAINT	N	Abigail	Milne	530.00	609.50	22/11/2021	12:10:22			Yes	HOP001	Hope Works (Pty	ý,
PR0000690	MAINT	N	Abigail	Milne	530.00	609.50	22/11/2021	12:10:22			Yes	BEA001	Bearing and Shoe	e
PR0000690	MAINT	N	Abigail	Milne	530.00	609.50	22/11/2021	12:10:22			Yes	HOP001	Hope Works (Pty	Y.
PR0000691	MAINT	N	Abigail	Milne	600.00	690.00	22/11/2021	12:18:23			Yes	TIA001	Titan Group	
PR0000691	MAINT	N	Abigail	Milne	600.00	690.00	22/11/2021	12:18:23			Yes	WES001	Westwood Dyna	ı
PR0000692	MAINT	Ν	Abigail	Milne	459.96		22/11/2021	12:23:21			Yes	HOP001	Hope Works (Pty	Y.
PR0000704	MAINT	Ν	Julanda	Kessler	0.00	0.00	28/01/2022	10:44:31			No	BIG0001	Big Bargains	
PR0000705	MAINT	N	Julanda	Kessler	350.00	402.50	01/03/2022	15:26:47			Yes			

- 11. The **Edit Requisition -** [purchase requisition number] screen will be displayed.
- 12. Note that the information on this screen is only available for viewing.
- 13. Click **Back** to return to the **Purchase Requisition Listing** screen.

4	Ŧ					Edit Requ	uisition - PRO	0000705 - BI	PO: Version	2.5.0.7 - Exa	mple Company v2	.5.0.7				x
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Help v2024.5.0.7/1.0 - Pg 21 - Printed: 21/08/2024



ISSUE

- 1. From the Part Requests for WO Code [work order code] screen,
- 2. Click on the **row** of the Work Order you wish to issue.
- 3. Click on Issue.

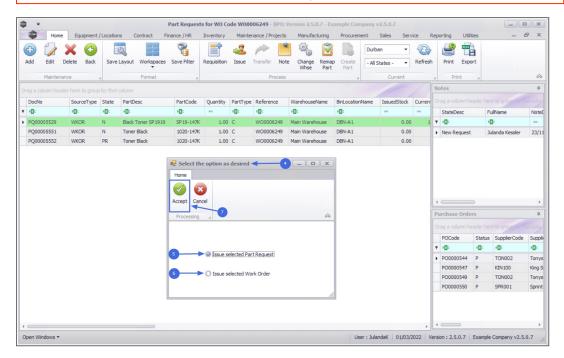
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- 4. The **Select the option as desired** screen will display.
- 5. Select the **Issue selected Part Request** option if you want to issue the initially selected part request, or



- 6. Select the **Issue selected Work Order** option if you want to issue all the part requests linked to the work order.
- 7. Click on Accept.

Refer to Part Requests - Issue - Stock Linked to a Work Order (WKOR) for more information on how to Issue a Part Request.



NOTE

- 1. From the Part Requests for WO Code [work order code] screen,
- 2. Click on the **row** of the part request you wish to add a note against.
- 3. Click on Note.
- 4. When you receive the **Procurement Request Note** message to confirm;
 - Are you sure you want to add a note against this part request item?
- 5. Click on Yes.



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- 6. The Add a request Item Note screen will be displayed.
- 7. Add the note details as required and click on **Save**.

			Add	a request Ite	m Note - BPO: Version 2	5.0.7 - Example O	ompany v2.5.0.	7					
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Open Windows -							User : Ju	landaK (01/03/2022	Version : 2.5.	0.7 Example	Company v2.5.	0.7



- 8. You will return to the **Part Requests for WO Code** screen.
- 9. When you receive the **Request Item Processing** message to confirm;
 - Note has been added to successfully.
- 10. Click on OK.

4	Ŧ			8		Part Request	s for WO Co	ode WOO	006249 - BPO	Version 2.5.0.7 - E	xample Co	mpany	v2.5.0.7						x
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CHANGE WAREHOUSE

If there is no stock in the selected warehouse on the part request, then stock can either be transferred to the requested warehouse, or the warehouse selected, can be changed. This process can only be done for part requests linked to a work order on a Call or a Project.

- 1. From the Part Requests for WO Code [work order code] screen,
- 2. Click on the **row** of the part request you wish to change the Warehouse for.
- 3. Click on Change Warehouse.



- 4. When you receive **Change Warehouse** message to confirm;
 - Are you sure you want to change the warehouse on part
 - no. [part code] to a different warehouse?
- 5. Click on **Yes**.

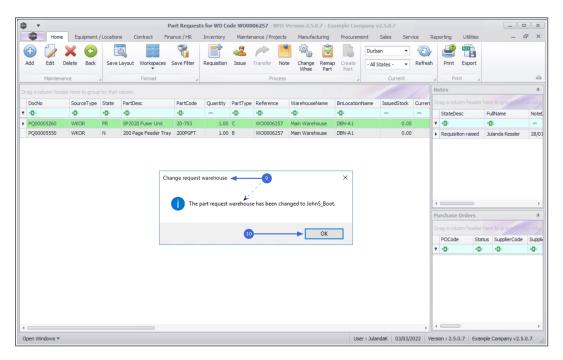
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- 6. The **Select the new warehouse** screen will be displayed.
- 7. Click on the **row** of the Warehouse you wish to change to.
- 8. Click on OK.



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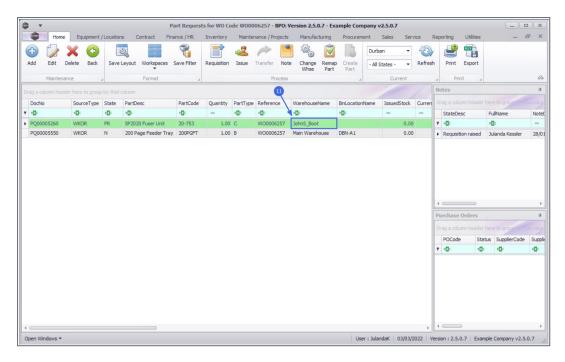
- 9. Next you will receive the Part request warehouse message to confirm;
 - The part request warehouse has been changed to [warehouse name].
- 10. Click on OK.



Help v2024.5.0.7/1.0 - Pg 27 - Printed: 21/08/2024



11. The **Part Requests for WO Code** screen has been updated with the selected **warehouse** for the part request.



REMAP PART

If a part request was raised for an incorrect part, then the store person can remap the request to the correct part.

- 1. From the Part Request for WO Code [work order code] screen,
- 2. Click on the **row** of the part request you wish to remap the part for.
- 3. Click on Remap Part.
- 4. When you receive the **Remap Part** message to confirm;
 - Are you sure you want to remap part no. [part code] to an existing part?
- 5. Click on Yes.



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- 6. The **Select the new part** screen will be displayed.
- 7. Click on the **row** of the part you with to remap the part request to.
- 8. Click on OK.

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- 9. Next you will receive the Remap Part message to confirm
- 10. Part No. [part code] has been remapped to part no. [part code].
- 11. Click on OK.

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PRINT REMAPPING REPORT

- 12. The **Remapping Report** message will display to confirm;
 - Do you wish to print the part remapping report?
- 13. Click on Yes to be directed to the Preview screen, or
 - Click on No to return to the Part Request for WO screen.



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- 14. The Part Remap Report will display in the **Preview** screen.
- From here you can make cosmetic changes to the document, as well as Zoom, View, Print, Export or Email the Part Remap Report.
- 16. **Close** the Report Preview screen when done.



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PRINT PICKING SLIP

- 1. From the Part Requests for WO Code [work order code] screen,
- 2. Click on **Print**.

PRINT ALL REQUESTS ON WORK ORDER

- 3. When you receive the **Picking Slip** message to confirm;
 - Do you wish to print the picking slip for all requests on this work order?
- 4. Click on Yes.



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- 5. The Picking Slip will display in the **Preview** screen.
- From here you can make cosmetic changes to the document as well as Zoom, View, Print, Export or Email the Picking Slip.
- As Yes was selected, all the part request items linked to the Work Order are listed on the slip.
- 8. **Close** the Report Preview screen when done.

For a detailed handling of this topic refer to Part Requests - Print (Picking Slip) for Part Request originating from a Work Order (WKOR)



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PRINT SINGLE REQUEST

- 1. When you receive the **Picking Slip** message to confirm;
 - Do you wish to print the picking slip for all requests on this work order?
- 2. Click on No.



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- 5. The Picking Slip will display in the **Preview** screen.
- From here you can make cosmetic changes to the document as well as Zoom, View, Print, Export or Email the Picking Slip.
- 7. As **No** was selected, only the selected part request will pull through to the Picking Slip.
- 8. **Close** the Report Preview screen when done.

For a detailed handling of this topic refer to Part Requests - Print (Picking Slip) for Part Request originating from a Work Order (WKOR)



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Related Topics

- Part Requests Add
- Part Requests Edit (View)
- Part Requests Delete
- Part Requests Requisition Single Item
- Part Requests Requisition Multiple Items
- Part Requests Issue Stock Linked to a Sales Invoice (SINV)
- Part Requests Issue Stock Linked to a Work Order (WKOR)

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