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.

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**Ribbon Access:** Service > Work Orders

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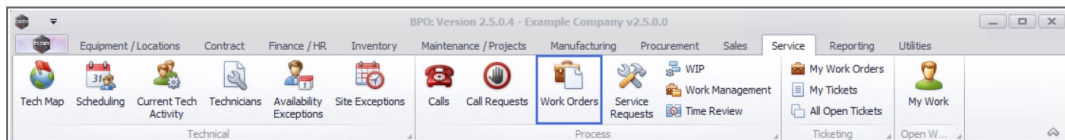


1. The **Work Orders Listing** screen will be displayed.
2. Select the **Site** where the work order was assigned.
   - The example has **Durban** selected.
3. Set the **Status** to **Open**.
4. Click on the **row** of the **work order** you wish to raise a part request for.
5. Click on the **Parts**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

6. 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**.
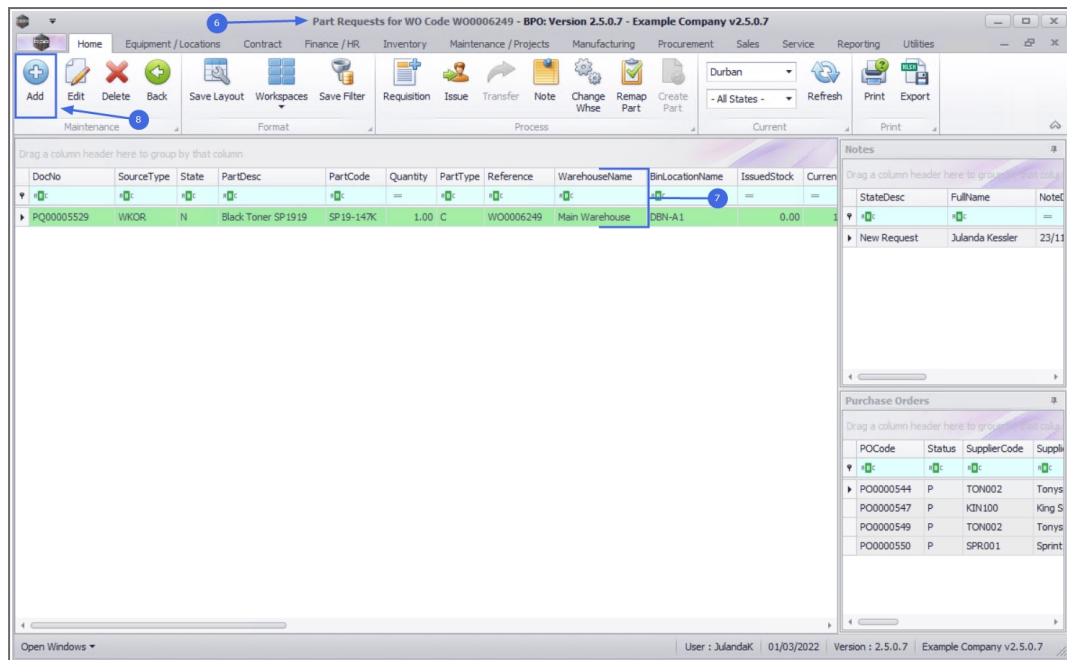
9. The **Parts Request** screen will be displayed.

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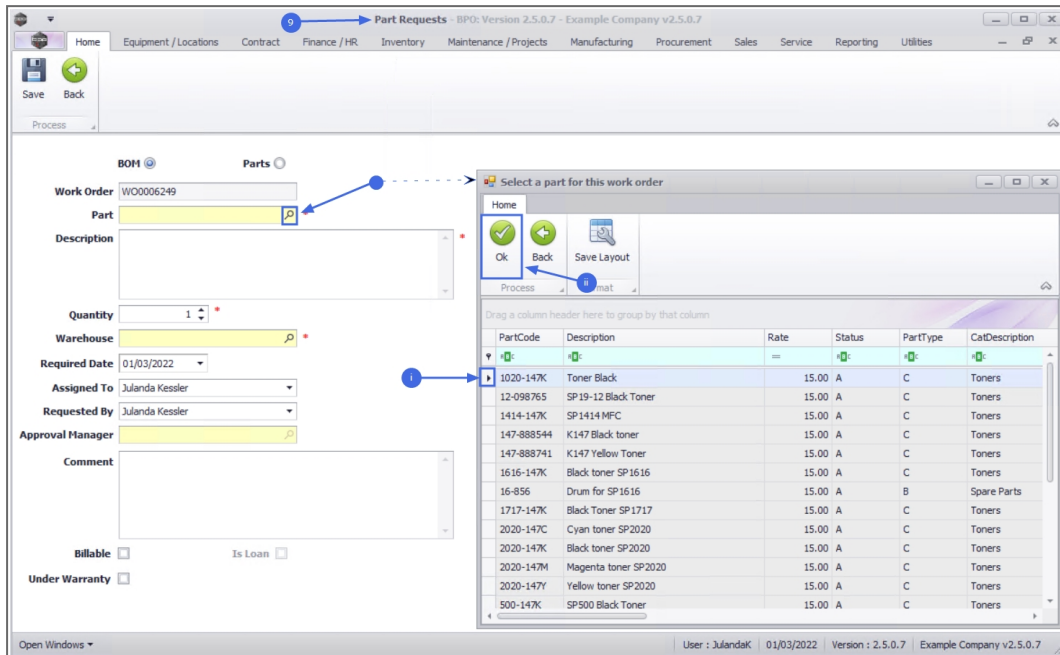
Refer to **BOMs - Introduction to BOMs** for a detailed handling of the topic.

- **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.



- **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.
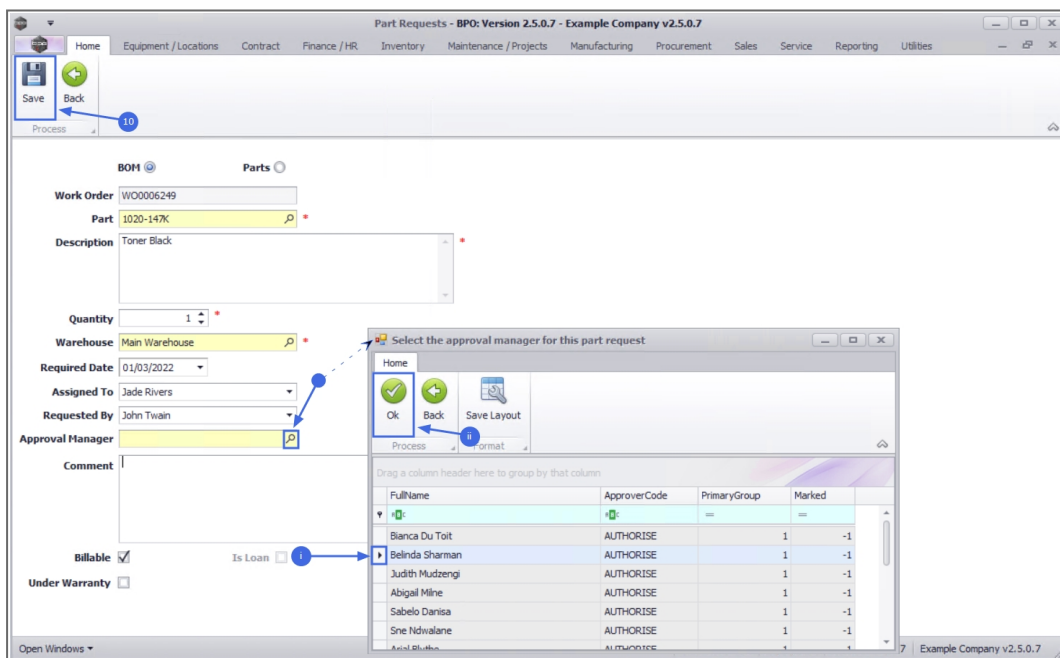
## Approval Manager

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**.

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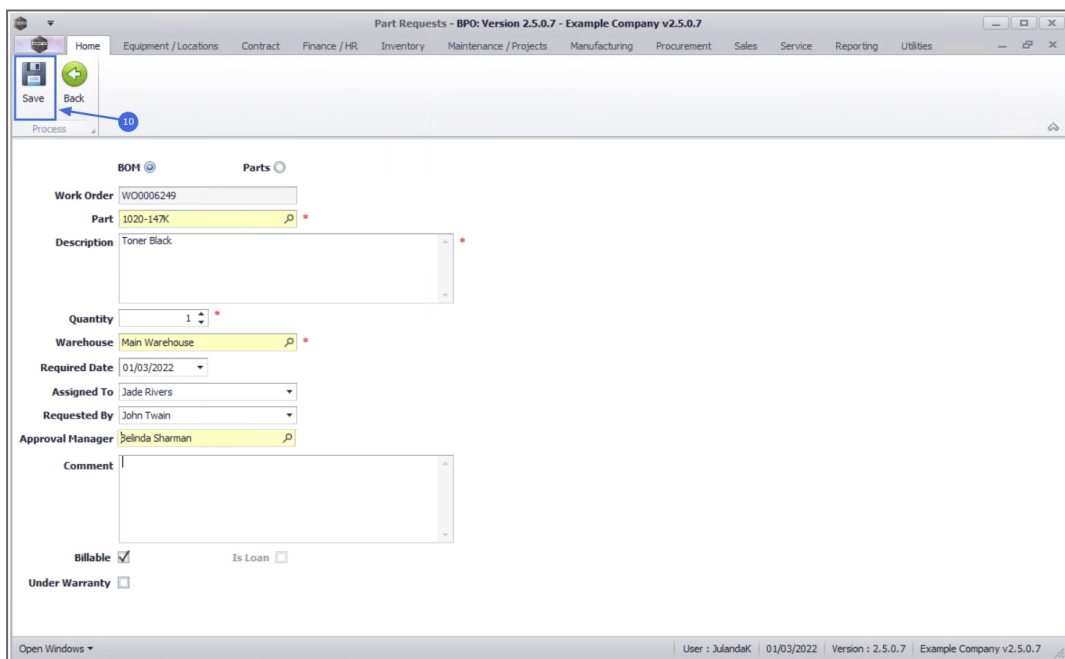
> 📝 **Note** that only stock items can be marked as billable, asset and loan requests will not be billable.

- **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.

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

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]**.**
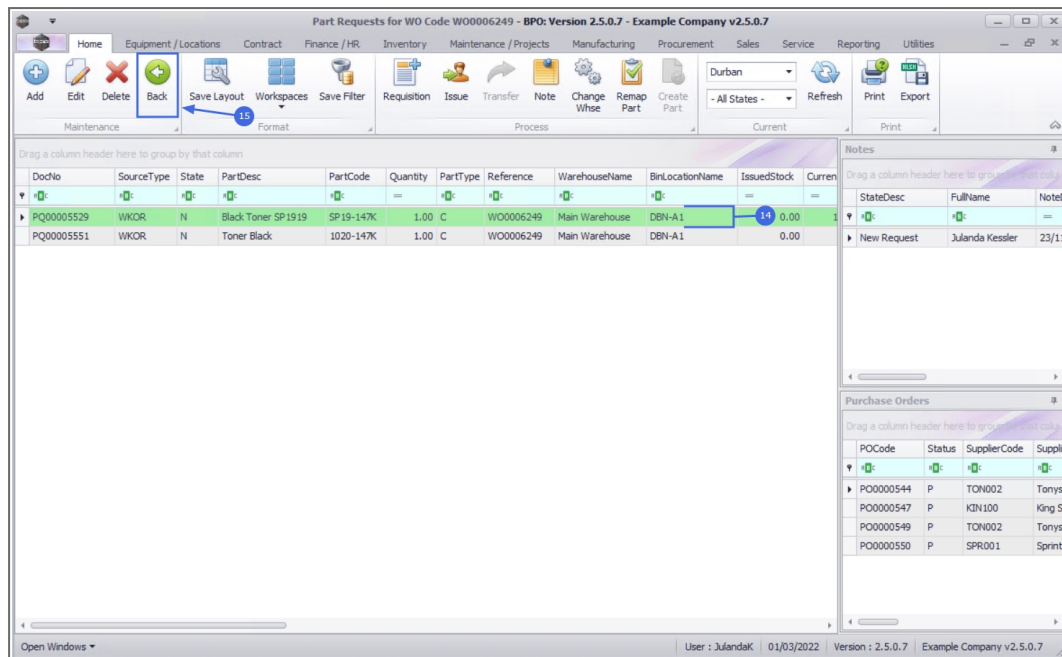
13. Click on **OK**.
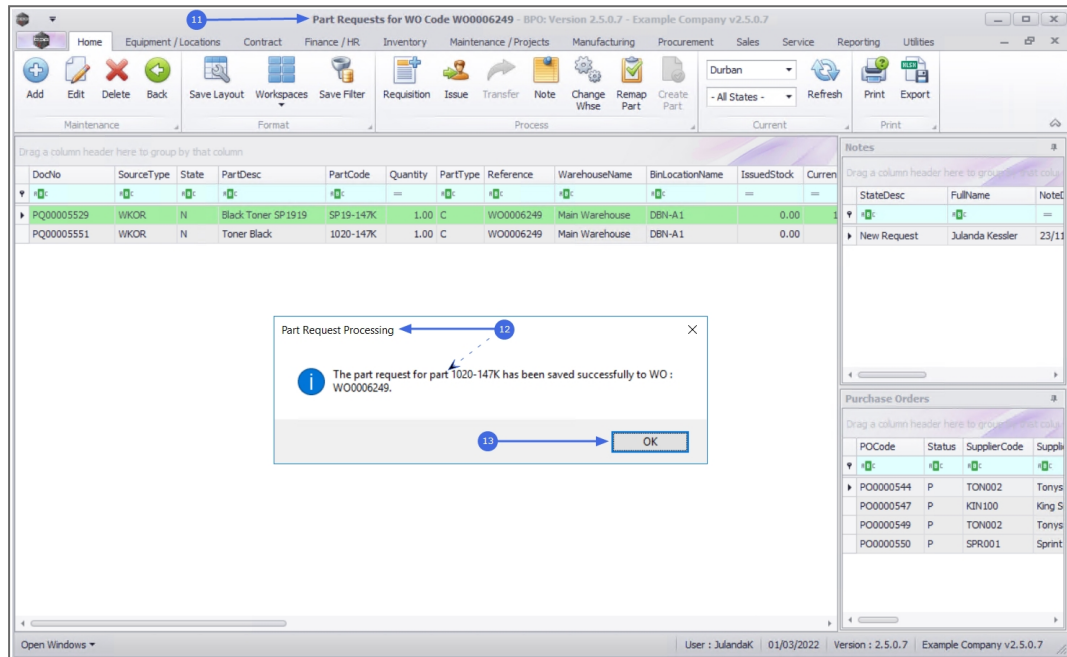


14. The request can be viewed with any other requests that have been logged against the work order.

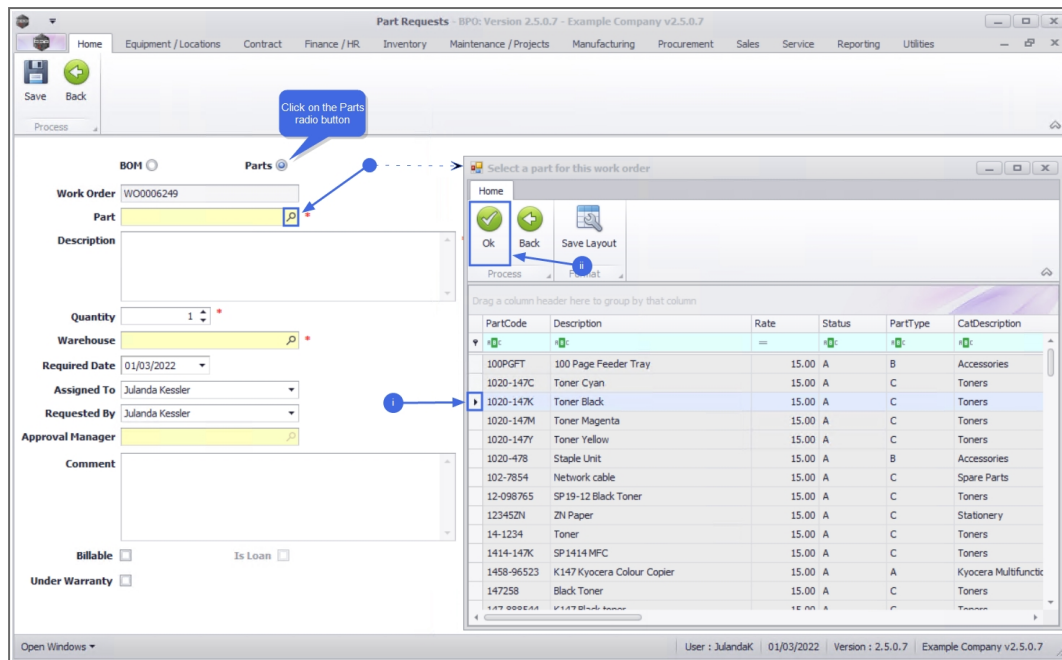   > ✏ **Note** that this information can be used to keep track of requests, by noting request and issue information.

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

## REQUEST FROM PART LIST

When you search for the part number, the system will display all 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**.

- **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.
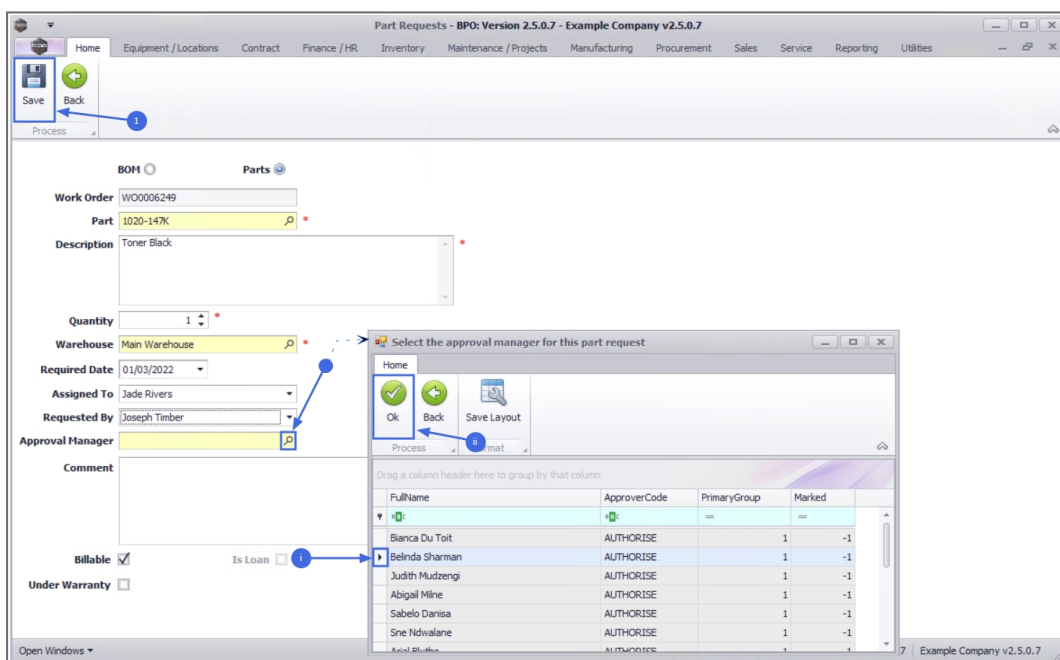
## Approval Manager

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**.



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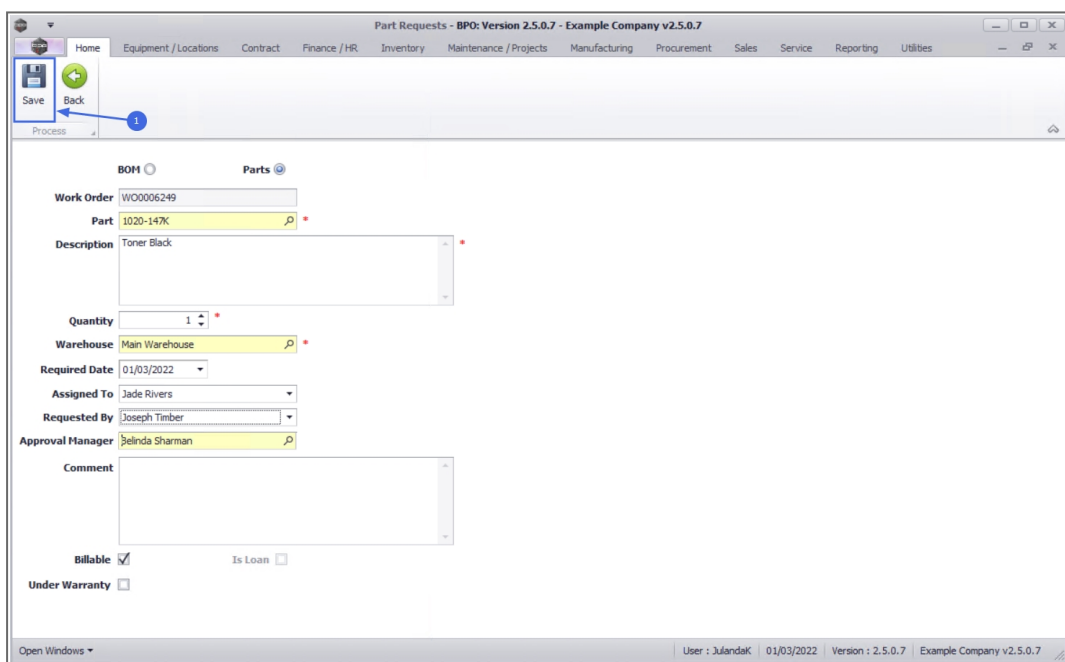
> ✏ Note that only stock items can be marked as billable, asset and loan requests will not be billable.

- **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.

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

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].
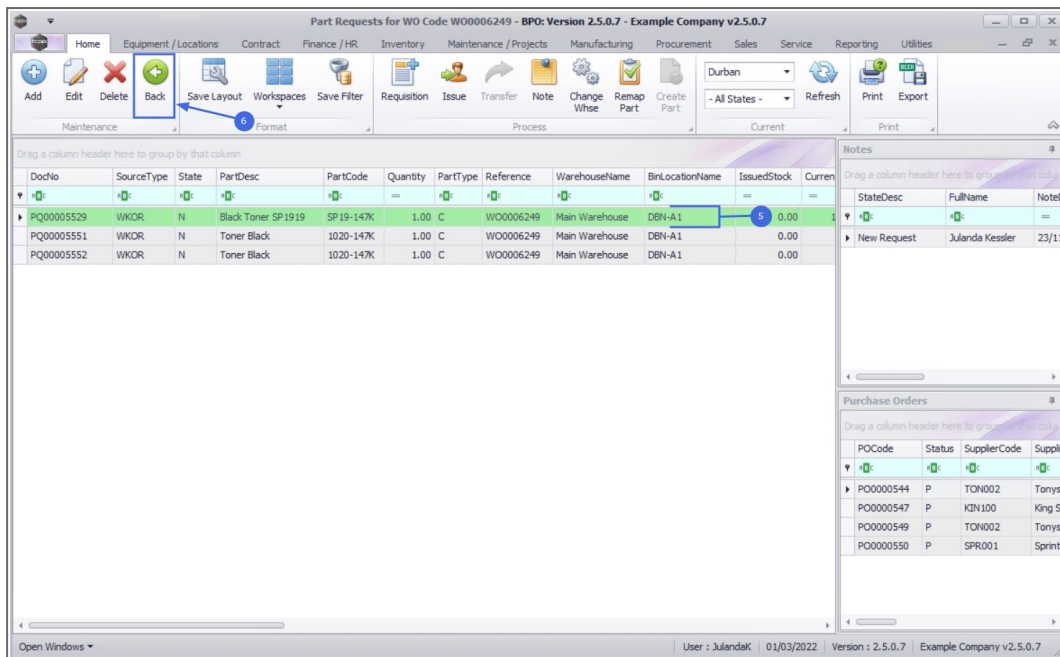
4. Click on **OK**.
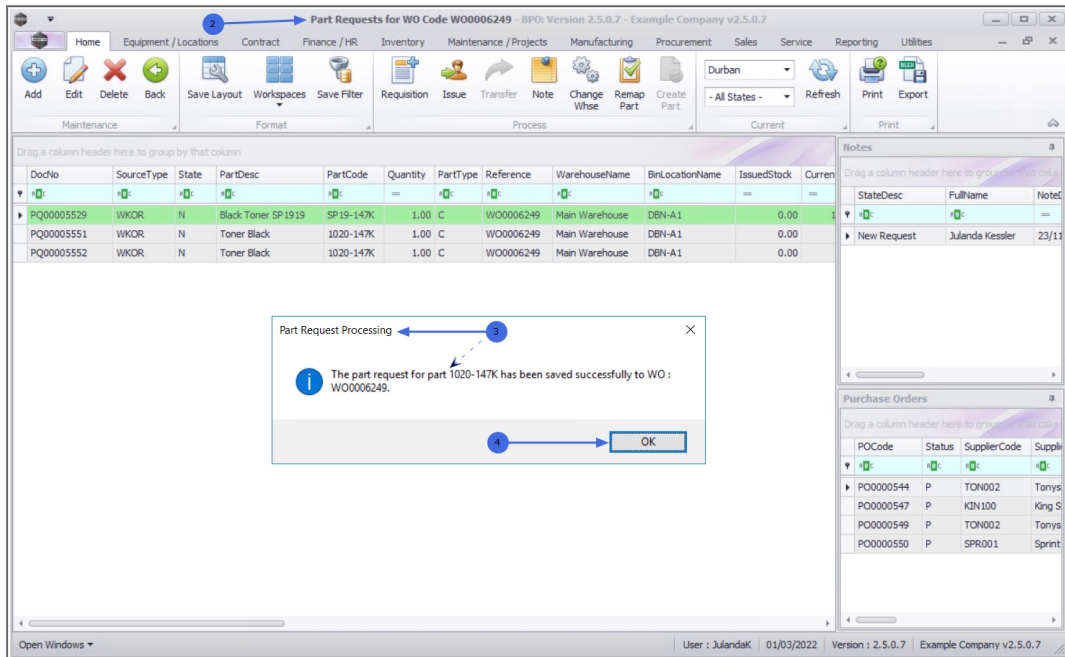


5. The request can be viewed with any other requests that have been logged against the work order.

> *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.

# 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**.
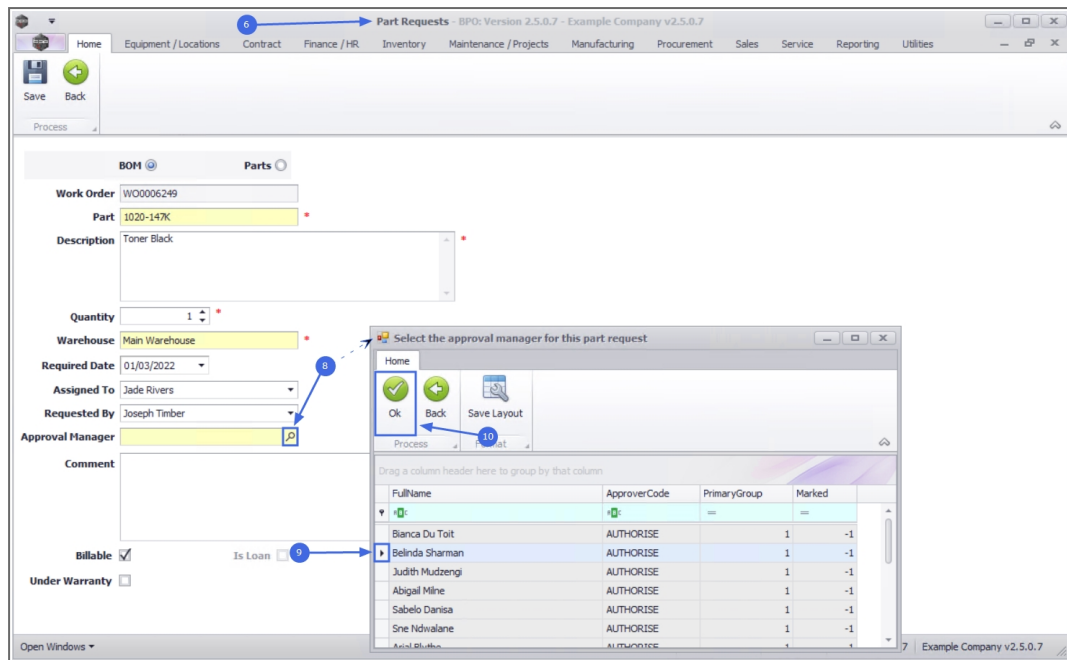
4. When you receive the **Part Request** message to confirm;
   - **Are you sure you want to edit this part request** [part request no] **on** [work order number]?
5. Click on **Yes**.
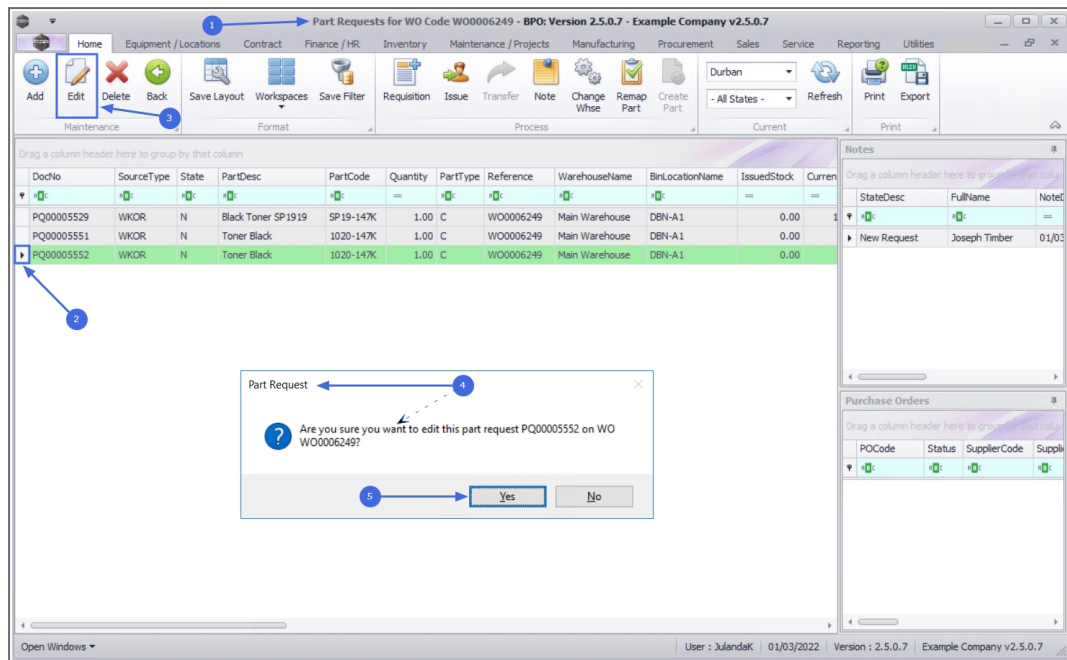
6. The **Part Requests** screen will be displayed.
7. Make the required changes to the BOM part or part request screen as required.

## 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**.

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

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**.
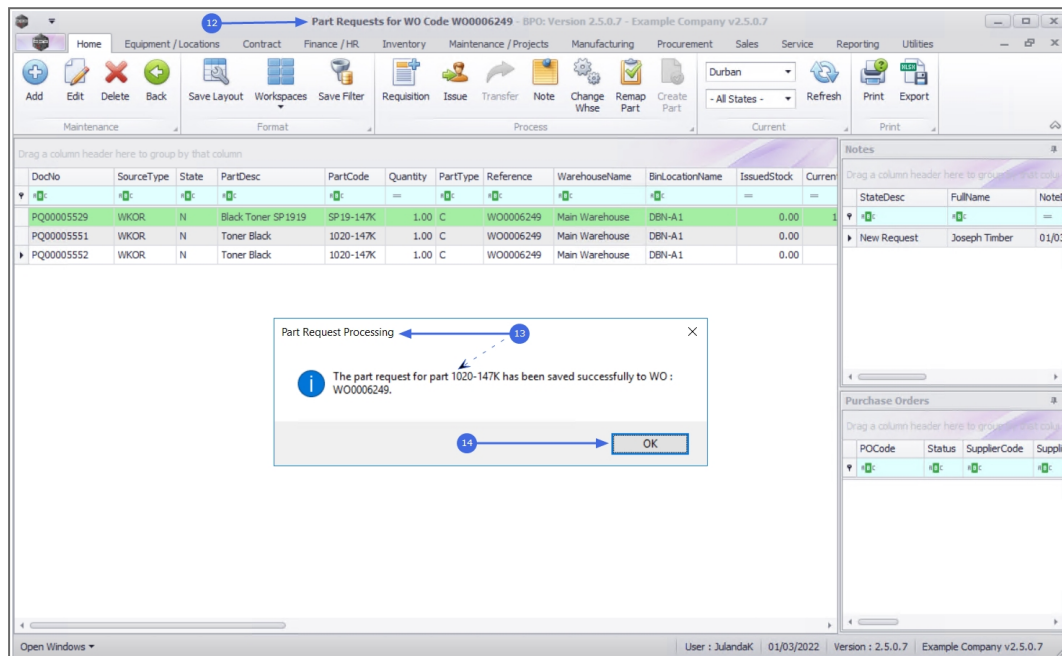


# DELETE PART REQUEST

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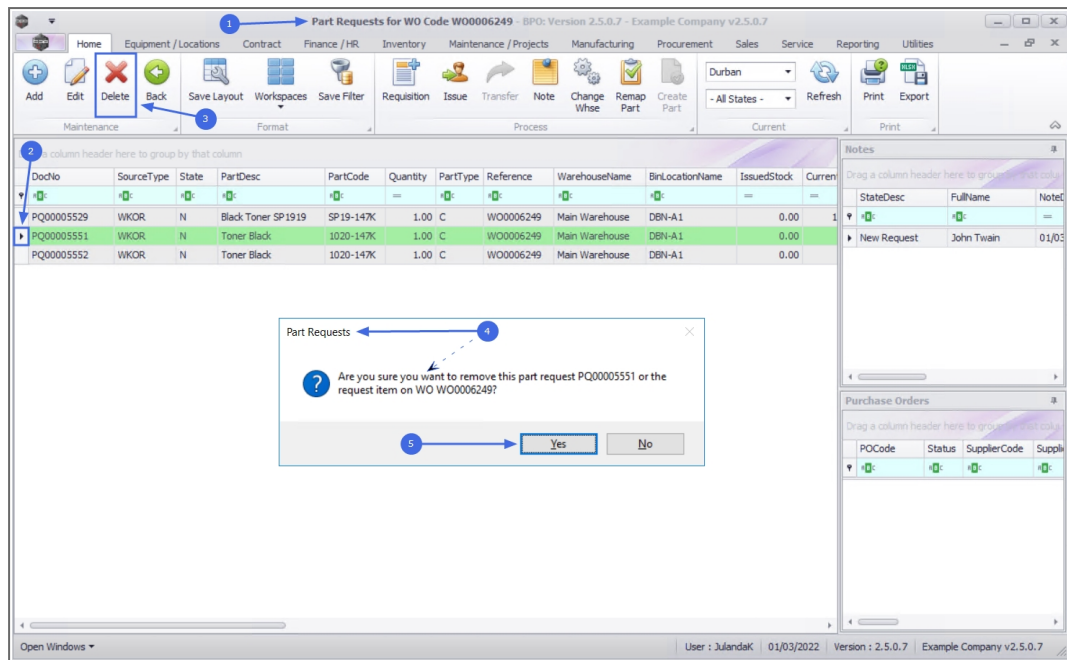
If there are more than one item linked to the part request, then the system will give you the option to remove either <u>all</u> the items on the request, or only the <u>selected</u> item.

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 <u>selected item only</u> or
    - Click on **No** to remove <u>all the items</u> linked to the part request.
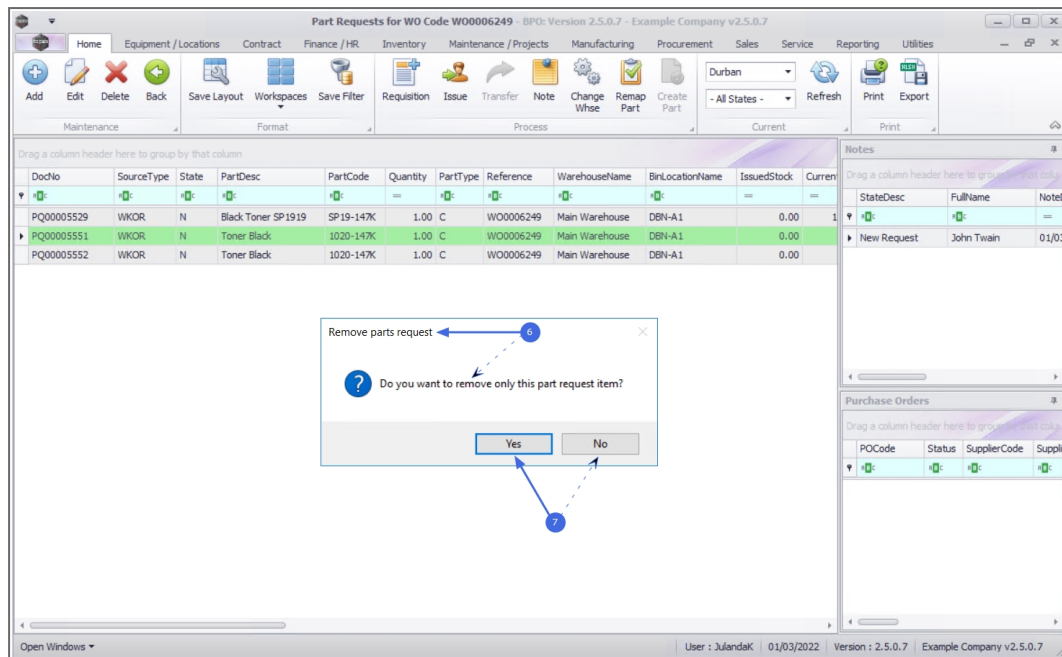
8. You will return to the **Part Requests for WO Code** screen.

9. Note that the part request that you have Deleted will be unavailable for further **Editing** or **Deleting** as well as the **part request process**.
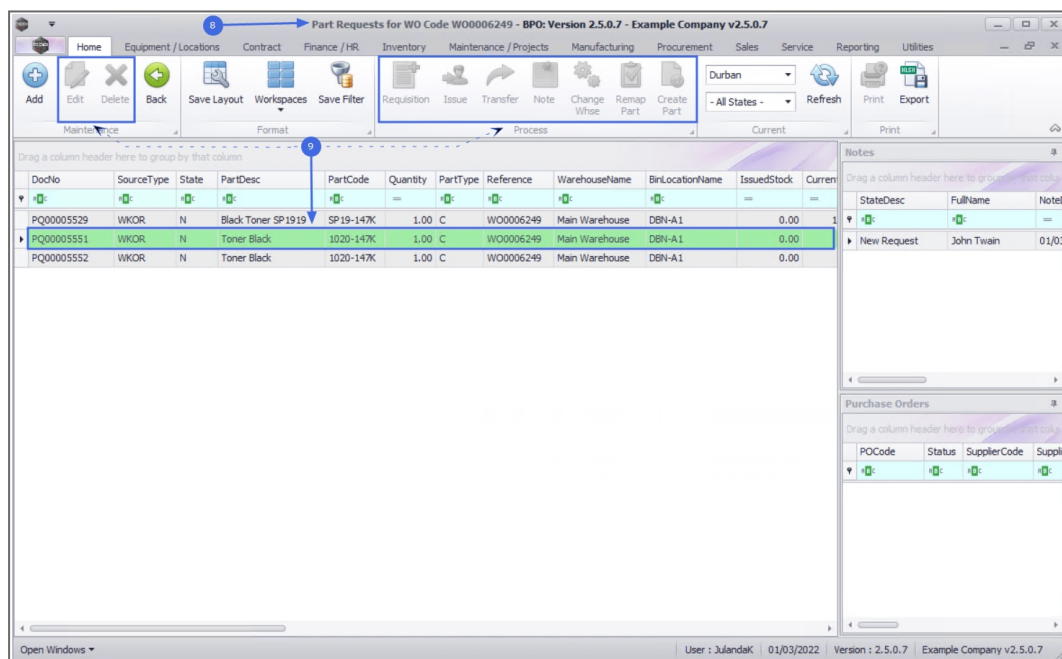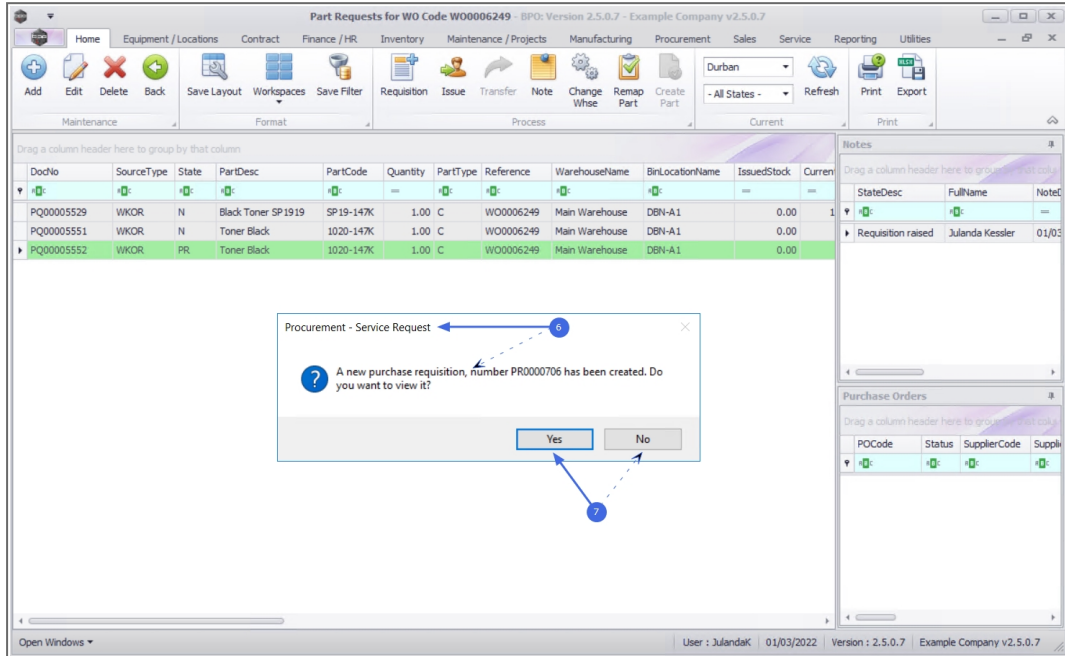
# REQUISITION

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 ware-house(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**.
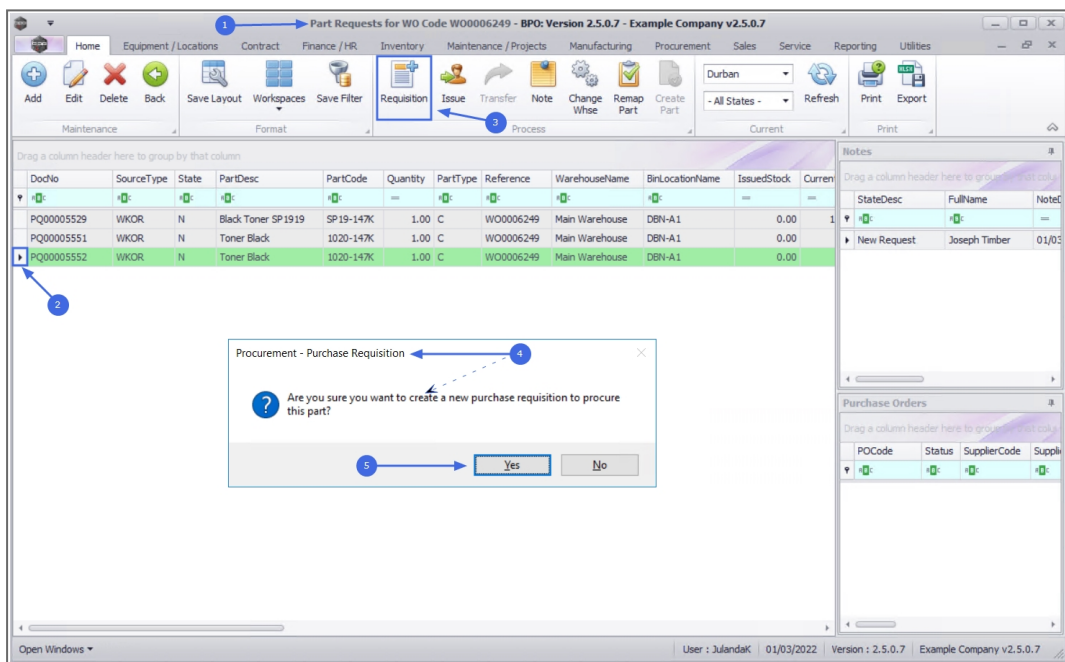


6. Next you will receive the **Procurement - Service Request** message to confirm;

- **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.



## VIEW PURCHASE REQUISITION

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

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.

# ISSUE

Only part requests originating from a Work Order (WKOR) or a Sales Invoice (SINV) can be issued.

Depending on the Company Configuration;

- The initial part requests may be set up to Auto Approve part requests, or

- May be set up to require an authorization by a Technical or Service Manager before stores will receive the request.

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**.
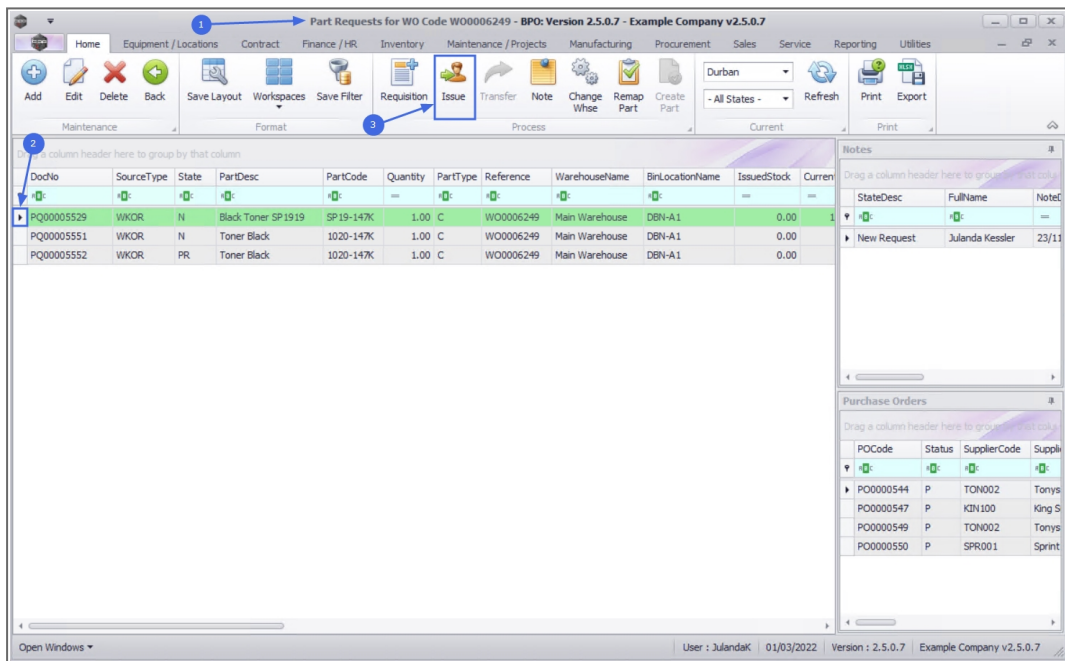


4. The **Select the option as desired** screen will display.
5. Select the **Issue selected Part Request** option if you want to issue the initially selected part request, or

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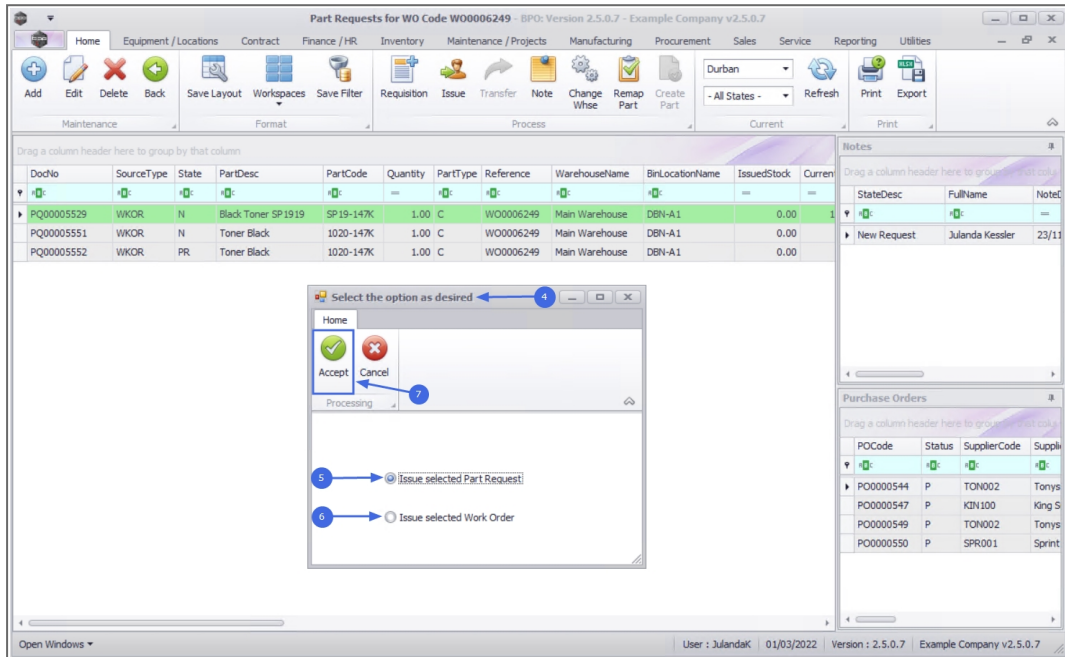
> 📖 Refer to **Part Requests - Issue - Stock Linked to a Work Order (WKOR)** for more information on how to Issue a Part Request.



## 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**.
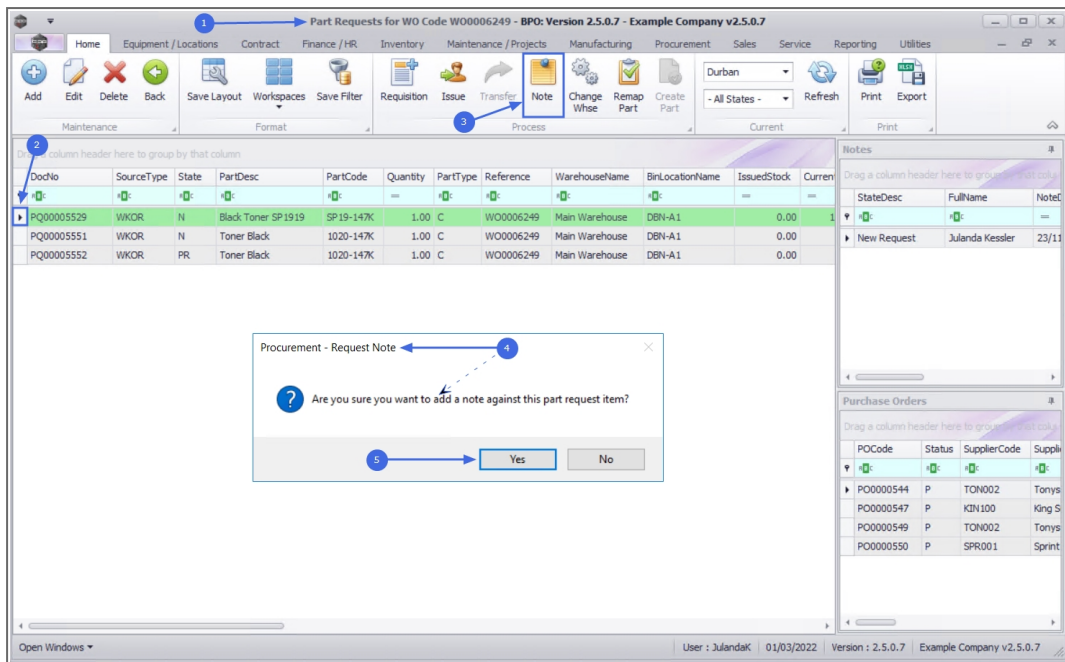
6. The **Add a request Item Note** screen will be displayed.

7. Add the note details as required and click on **Save**.

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**.



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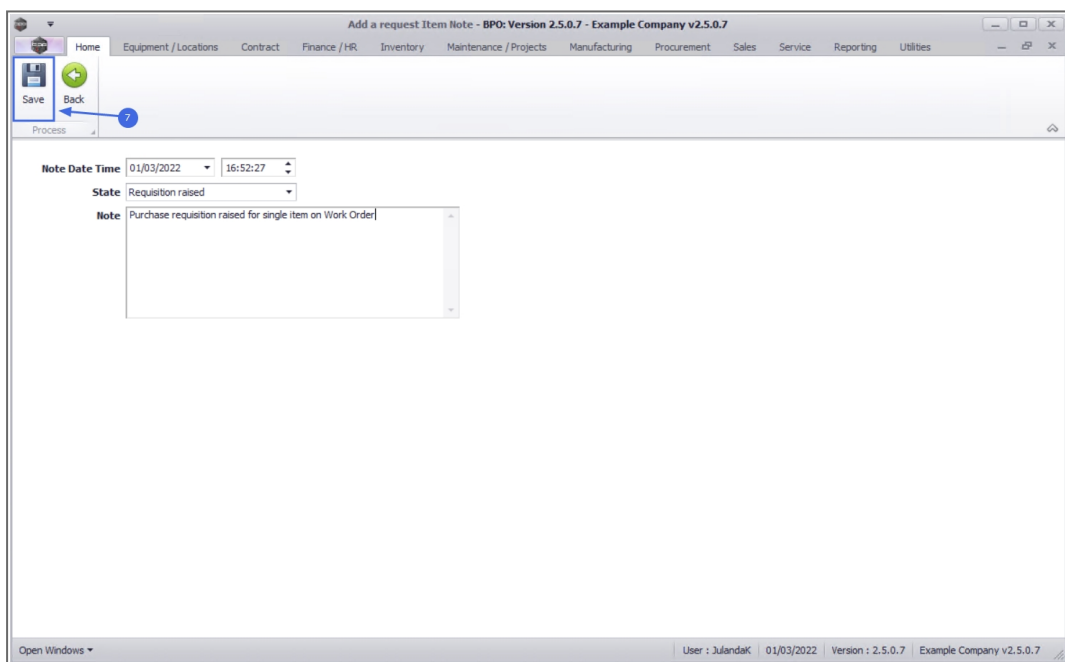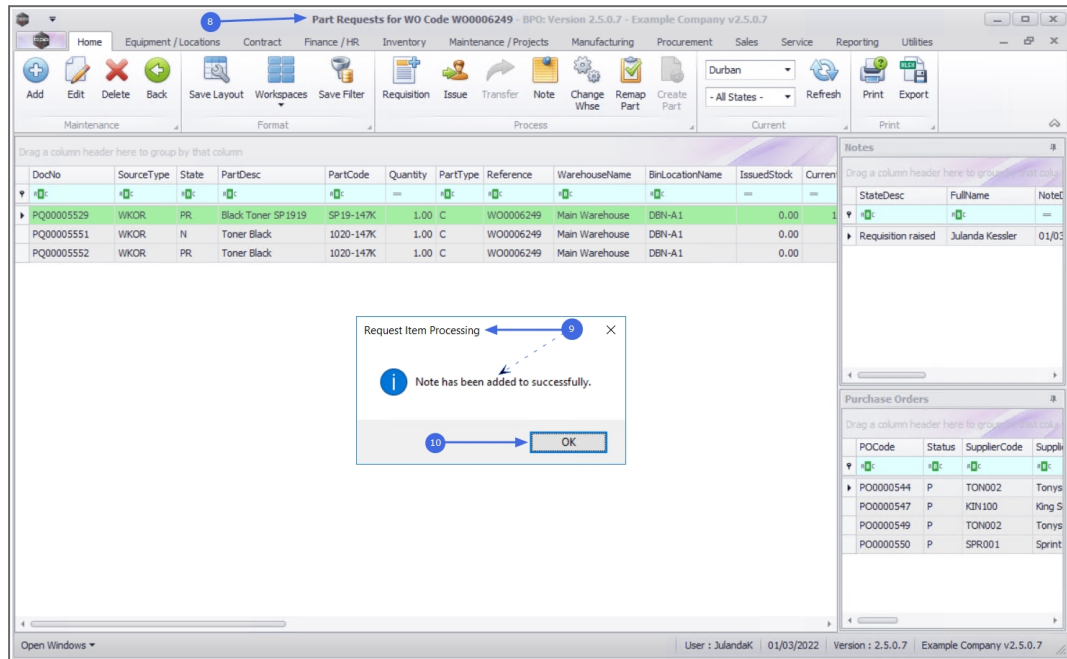
1.  From the **Part Requests for WO Code** [work order code] screen,
2.  Click on the **row** of the part request you wish to change the Warehouse for.
3.  Click on **Change Warehouse**.

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?**
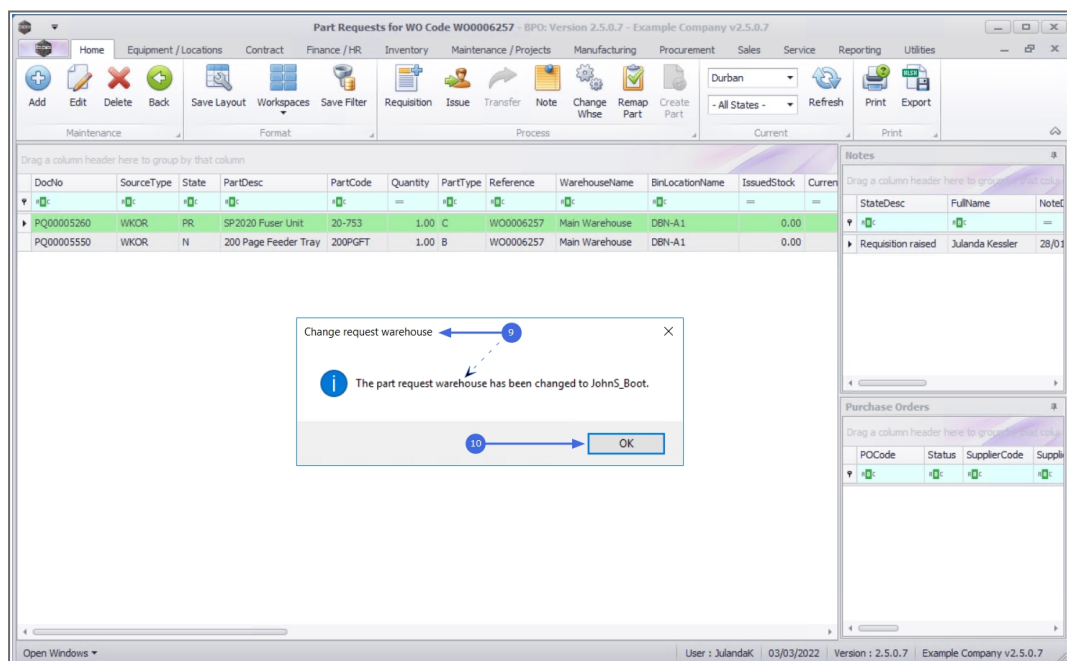
5. Click on **Yes**.
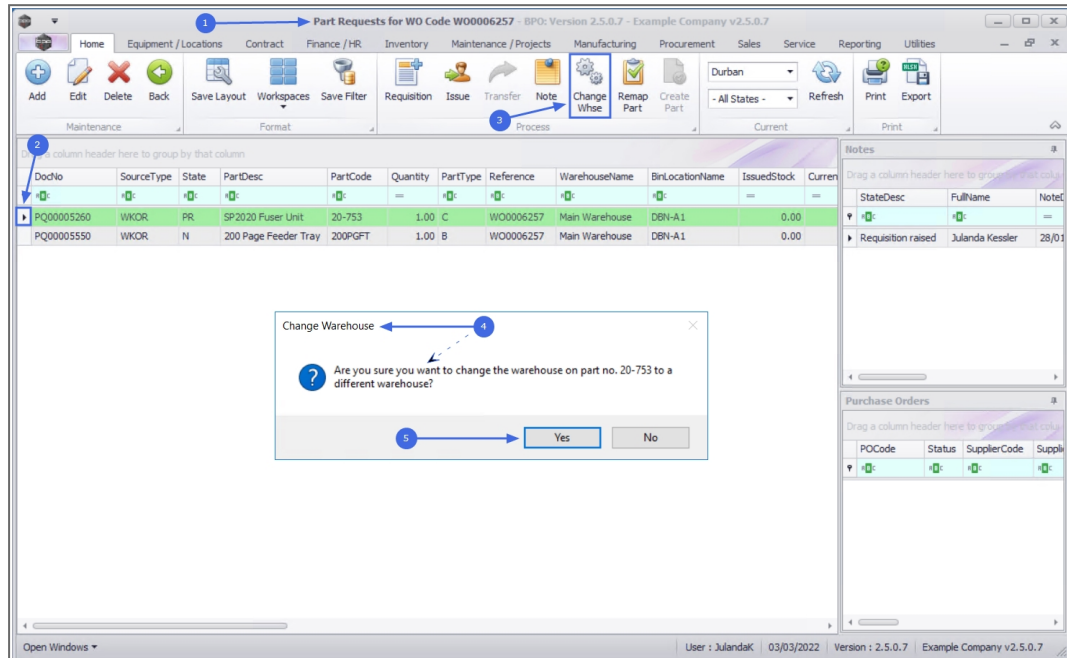


6. The **Select the new warehouse** screen will be displayed.
7. Click on the **row** of the Warehouse you wish to change to.
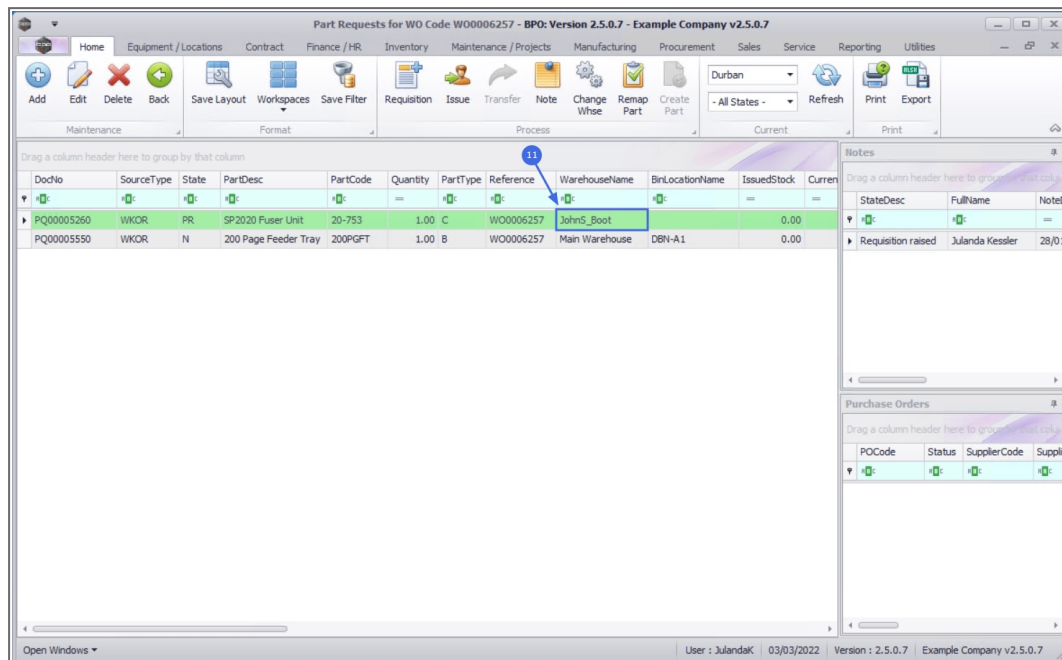8. Click on **OK**.
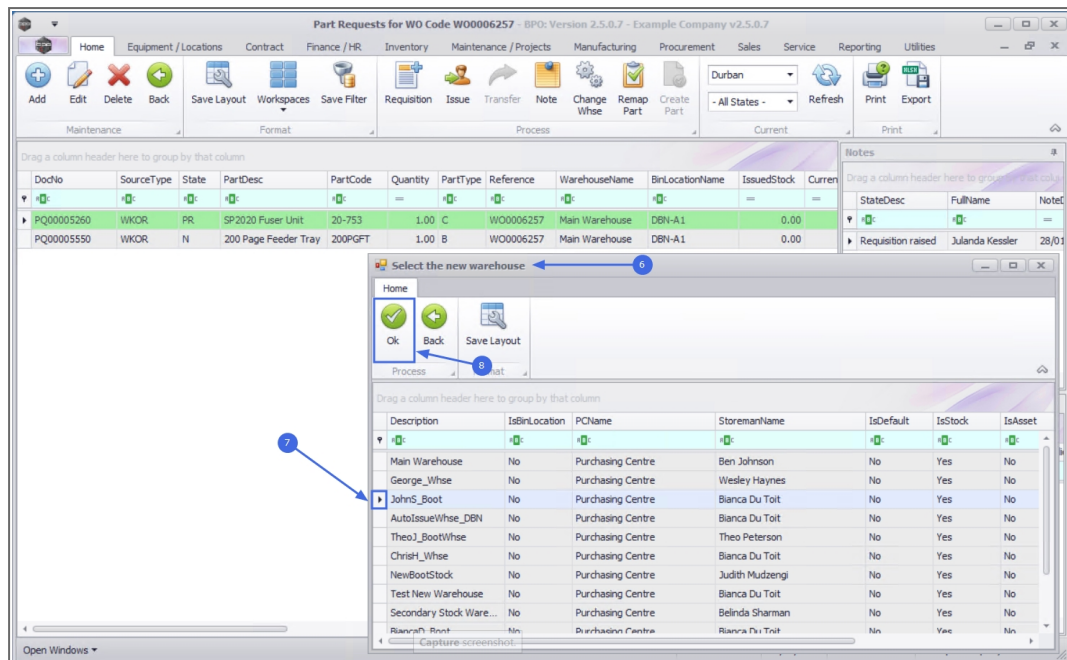
9. Next you will receive the **Part request warehouse** message to confirm;

- **The part request warehouse has been changed to** [warehouse name].
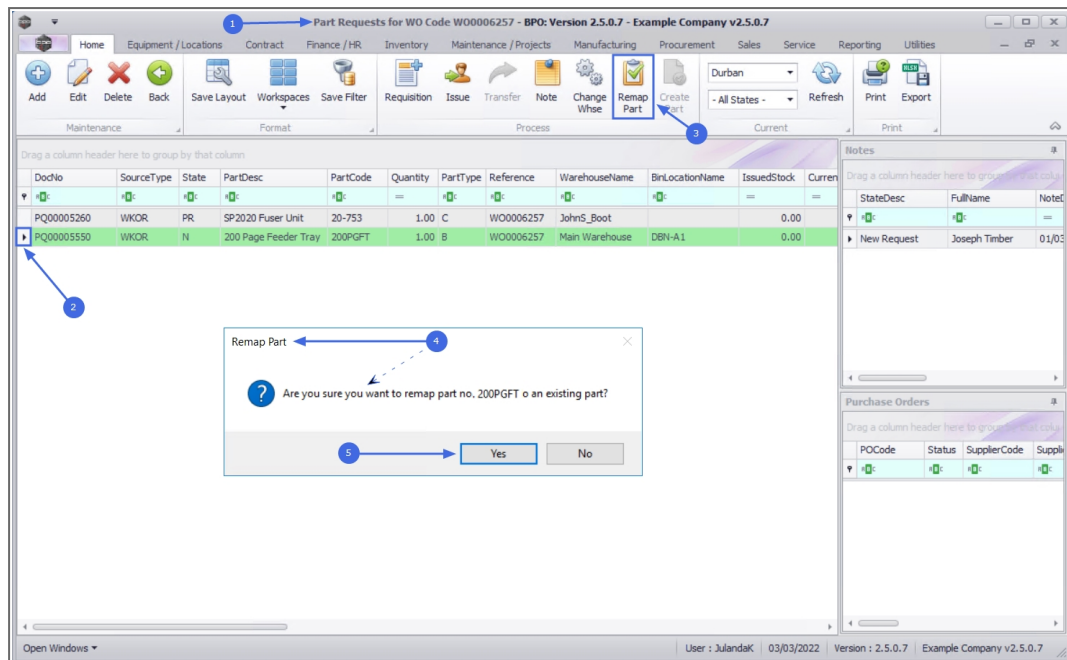
10. Click on **OK**.

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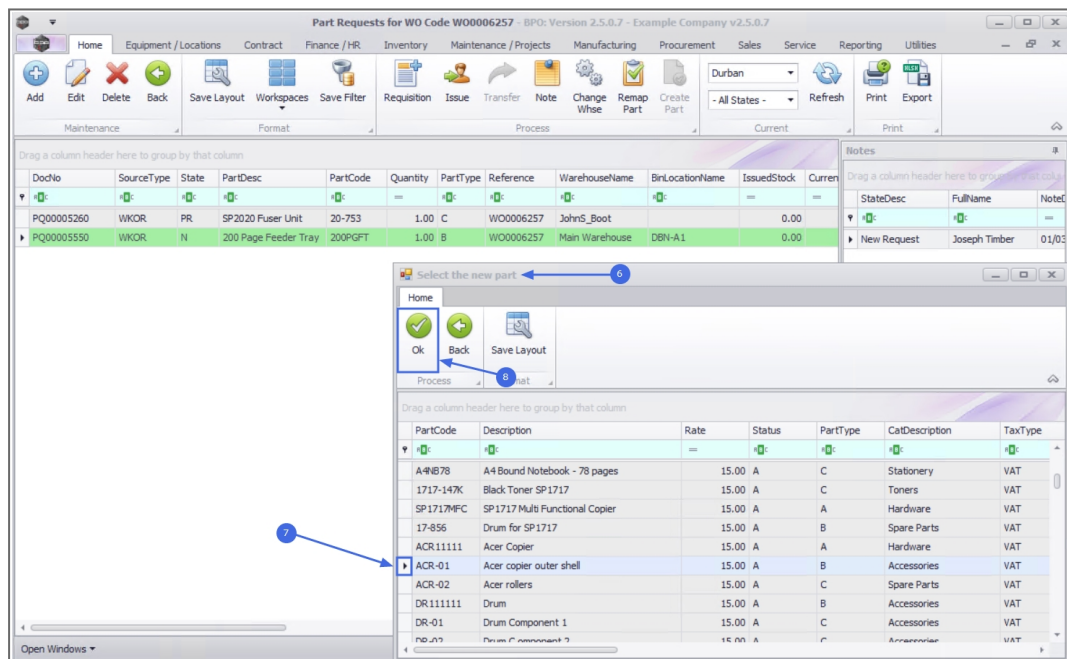


# REMAP PART

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**.

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**.

9. Next you will receive the **Remap Part** message to confirm

10. **Part No. [**part code**] has been remapped to part no. [**part code**].**
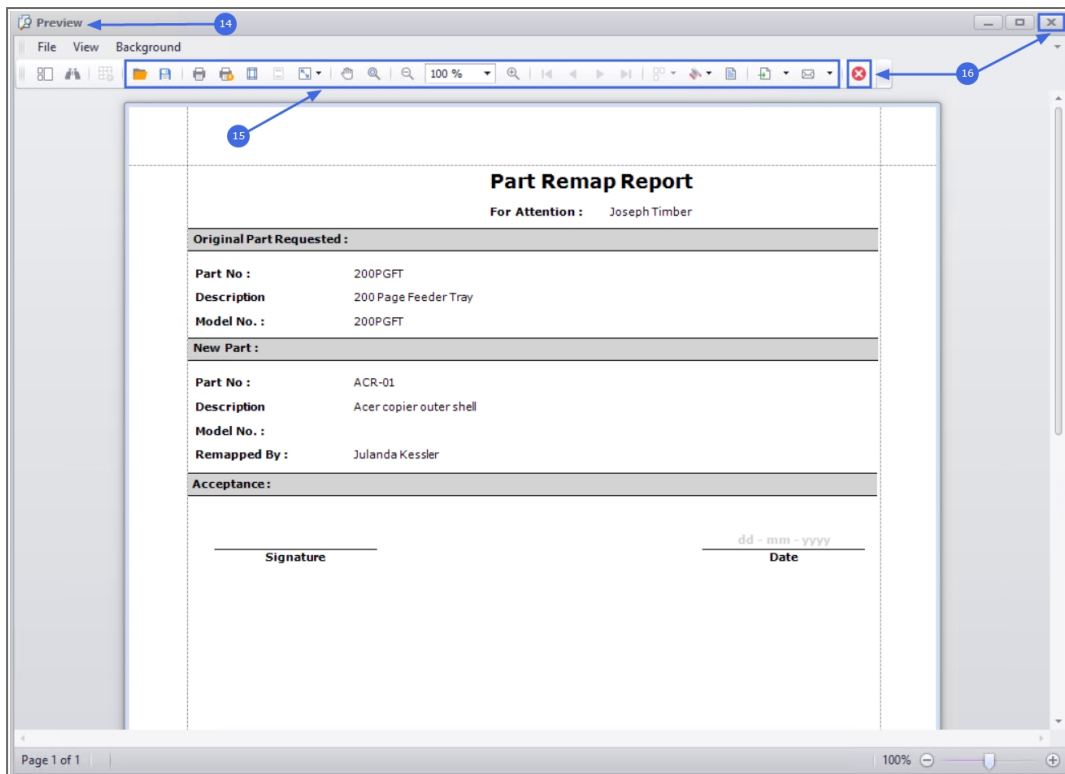
11. Click on **OK**.
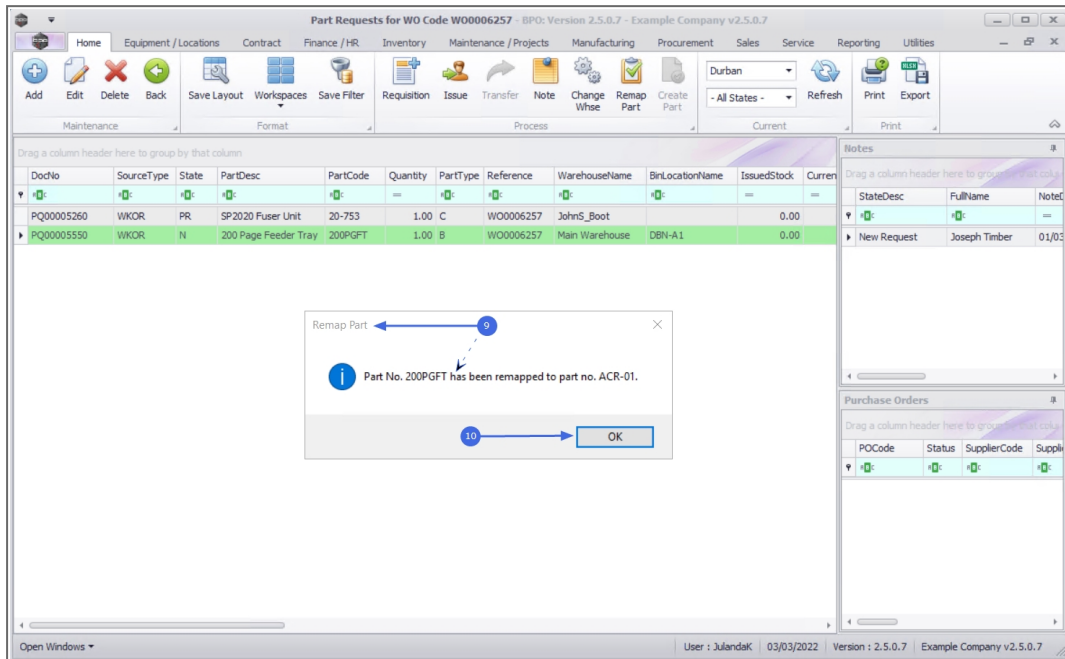


## PRINT REMAPPING REPORT

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.
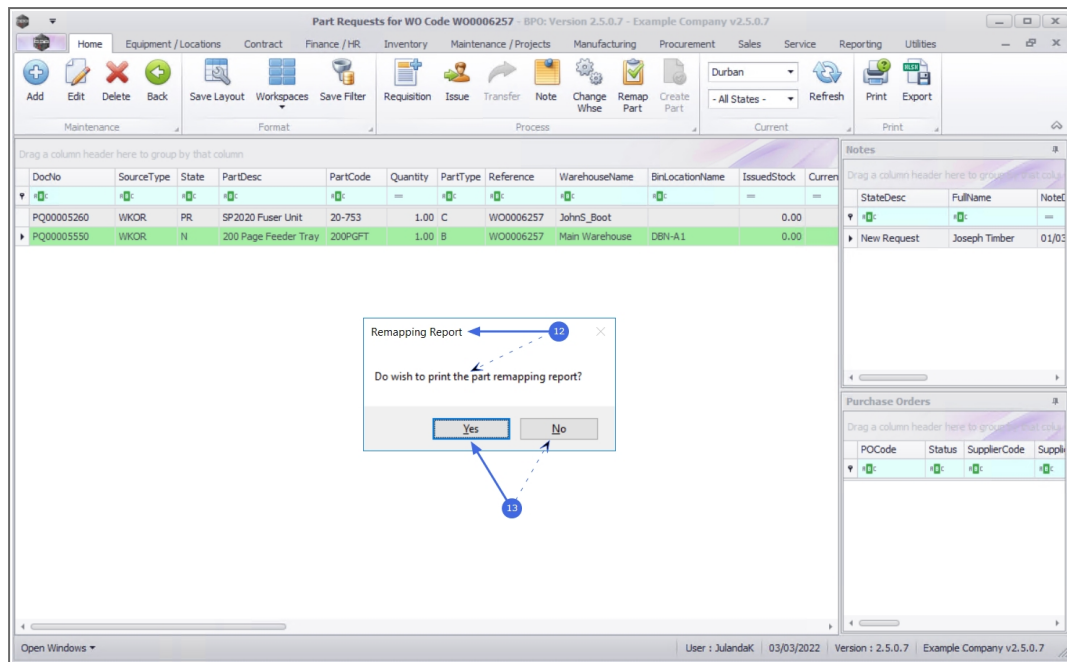
14. The Part Remap Report will display in the **Preview** screen.

15. 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.
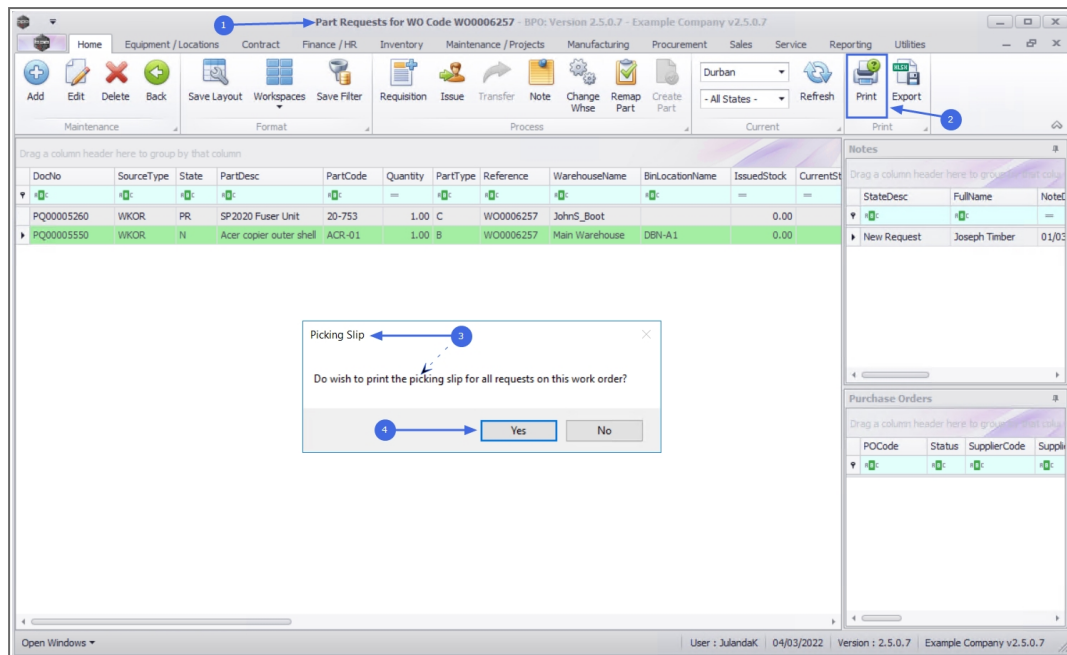
# PRINT PICKING SLIP

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?**
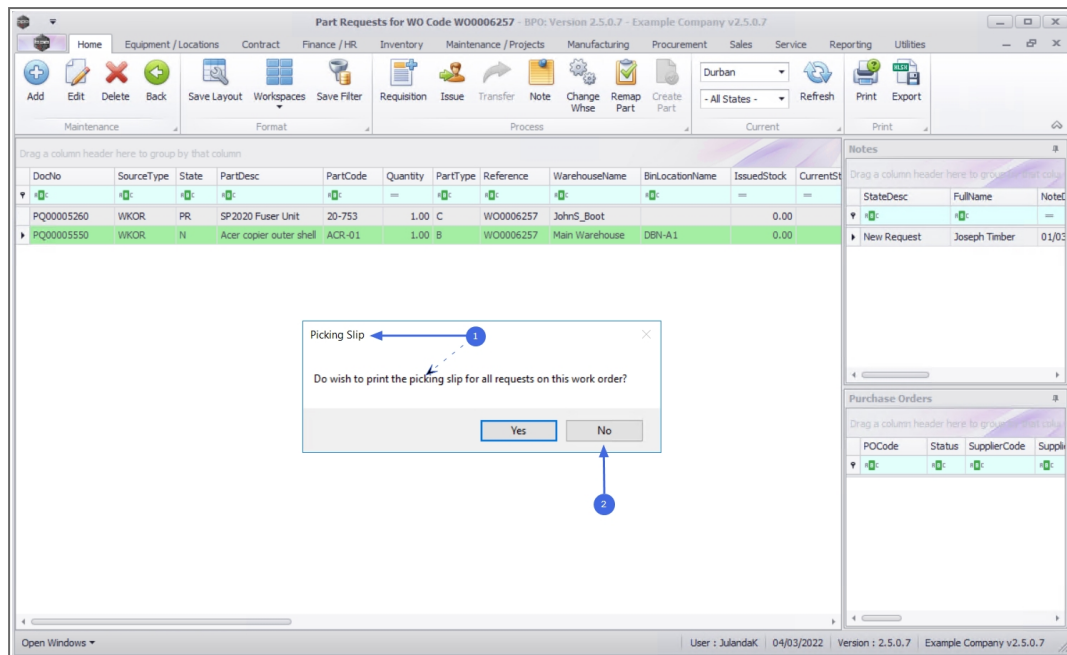4. Click on **Yes**.

5. The Picking Slip will display in the **Preview** screen.
6. From here you can make cosmetic changes to the document as well as **Zoom**, **View**, **Print**, **Export** or **Email** the Picking Slip.
7. 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)**
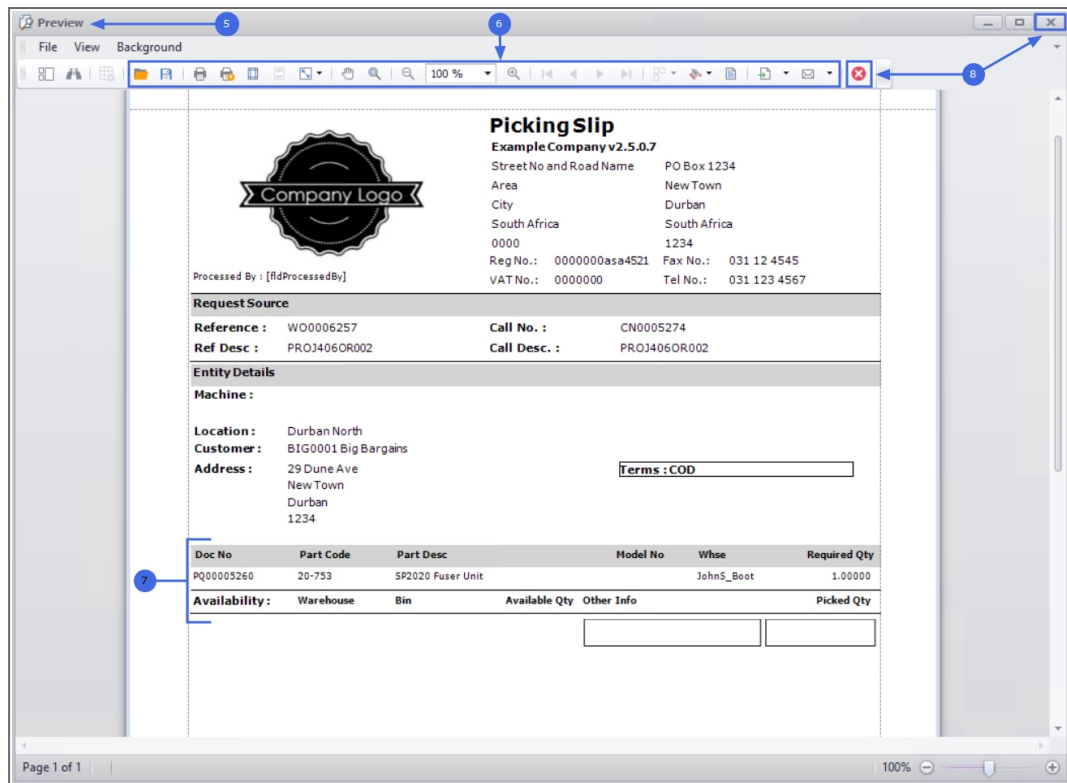
## PRINT SINGLE REQUEST

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**.

5.  The Picking Slip will display in the **Preview** screen.
6.  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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