

# SERVICE

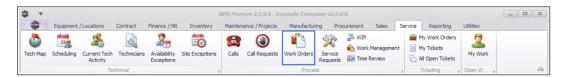
## WORK ORDERS - THIRD PARTY SERVICE REQUEST

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

	iew Close Comple		te Save	paces • Print Export Open		Find WO Reports				
Maintain	a Proce	SS	# Form	at a Print a	Current	3 A Reports	4			<
ter text to search 🕢 🔎	Drag a column header									
4	WOCode	WOType	CallReference	Description	Capitalise	CallDesc	RequestDa 🕶	Priority Invoiceat	le ProjectRef	Pr
Functions	<b>♀</b> 8 <b>0</b> C	R EC	8 <b>8</b> 0	REC	R B C	8 <mark>0</mark> 0	=	= 8 <b>8</b> 0	REC	8
	▶ E WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2 Yes		
Time		SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2 No		
	WO0006256	IMP	CN0005302	New machine implementation. Installation	No	New machine implemen	24/01/2022	1 No		
		NDS	CN0005274	PROJ406OR002	No	PRO3406OR002	19/01/2022	2 No		
Services	E WO0006253	PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3 No		
	WO0006252	REP	CN0005300	Printer displaying error code	No	Printer displaying error	18/01/2022	3 No		
	WO0006251	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		
X	· WO0006249	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PRJ0000419	Sc
		SM		WS - Weekly Service	No		23/11/2021	2 No	PRJ0000420	Sc
Parts	WO0006247	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PRJ0000418	Sc
	5 WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PRJ0000418	Sc
		SM		WS - Weekly Service	No		23/11/2021	2 No	PRJ0000417	S
	WO0006243	SM		WS - Weekly Service	No		16/11/2021	2 No	PRJ0000413	PF
Loans	· WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	2 No	PRJ0000413	PF
	WO0006241	SM		WS - Weekly Service	No		16/11/2021	2 No	PRJ0000413	PF
	· WO0006240	SM		WS - Weekly Service	No		16/11/2021	2 No	PRJ0000416	St
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	M
	· WO0006237	SM		WS - Weekly Service	No		09/11/2021	2 No		

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

#### ADD THIRD PARTY SERVICE

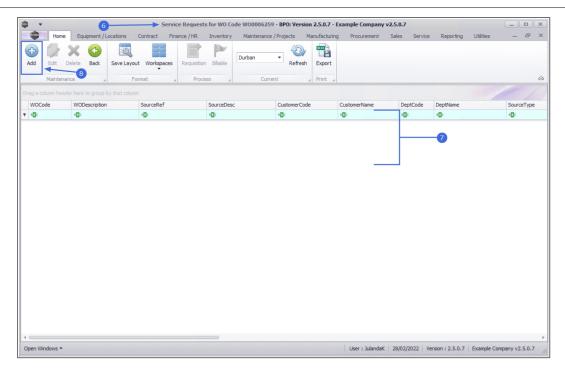
- 7. Any external service providers that have already been logged against the work order, will display in the data grid.
- 8. Click on Add.

(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*.



=	9	Thir	Party Services - BPO: Versio	n 2.5.0.7 - Example Com	any v2.5.0.7				x
Home	Equipment / Locations	Contract Finance / HR	Inventory Maintenance / P	rojects Manufacturing	Procurement	Sales Serv	ice Reporting	Utilities — r	8 X
Save Back									
	10								\$
Process a	~								~~
Work Order	WO0006259								
Service	INST	* م							
Description	Installation Fee		÷. •						
			-						
Quantity	1.00 🗘 *								
Price	1,200.00 *								
Assigned To	Jeff Rivers	-							
Required Date	03/03/2022 -								
Billable	$\checkmark$								
Comment	New printer scheduled for same day.	03/03/2022. Installation is	equired for the						
	same day.								
			-						
Open Windows 🕶					User : JulandaK	28/02/2022	Version : 2.5.0.7	Example Company 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.



¢ - <b>∩</b>	Service Requests	s for WO Code WO0006259	- BPO: Version 2.5.0.7 - I	Example Company v2	.5.0.7			_ • ×
Home Equipment / Locations C	Contract Finance / HR	Inventory Maintenance	Projects Manufacturing	g Procurement S	Sales Service	Reporting	Utilities	_ & ×
Add Edit Delete Maintenance	Workspaces Requisition		Refresh Export					\$
Drag a column header here to group by that column			n a run a				1	- /
WOCode WODescription	SourceRef	SourceDesc	CustomerCode	CustomerName	DeptCode	DeptName		SourceType
	* <b>0</b> ¢	4 <b>0</b> ¢	*Bc	* <b>0</b> ¢	REC	REC		1 <b>0</b> 0
WO0006259 Post Contract machine rep		Drum replacement required	HOP001	Hope Works (Pty) Ltd				
	Service Process	iing  iice Request of WO : WO000	6259 complete.					

#### EDIT THIRD PARTY SERVICE

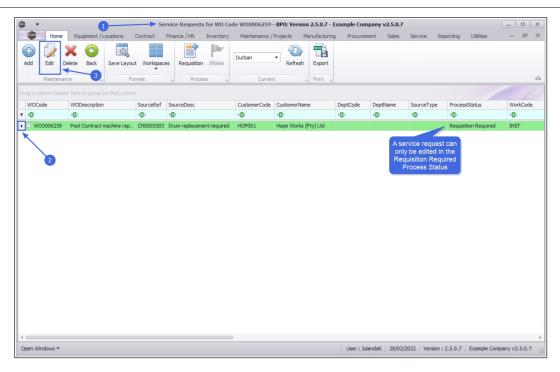
- 1. From the *Service Request for WO Code [WO number]* screen,
- 2. Click on the *row* of the *work order* you wish to *edit*.

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.

Image: Save Layout Workspaces	<b>•</b> =					Sei	rvice Re	equests	for WO Co	de W00006259	- BPO: Versio	on 2.5.0.7 -	Example Con	npany v2.5.0.3	7		
dd Edt Dele Back Mantenance Format Process Requisiton Blable Process Current Print Print WOOdde WODescription SourceRef SourceDesc CustomerCode CustomerMane DeptCode DeptMane SourceType ProcessStatus WorkCode © Code Octobect machine rep. CH0005203 Drum replacement required HOP001 Hope Works (Pty) Ltd Requisiton Required INST Service Request / res ou sure you wont to edit this service INST on WO W00005259? Are you sure you wont to edit this service INST on WO W00005259?		Home	Equipm	ent / Lo	cations	Contract	Finance	/HR	Inventory	Maintenance	/ Projects	Manufacturin	ng Procure	ment Sales	Service R	eporting Utilities	_ & ×
a column header here to group by that column WOCode *@: *@: *@: *@: *@: *@: *@: *@: *@: *@:	Add	Edit	~		-0	t Workspace	es Re	quisition	r	Durban							
W0Code       W0Description       SourceRef		Maintena	ince	4	For	rmat	4	Proces	ss a	Curre	nt	Print a					\$
Image:																	
Image: W00006259       Post Contract machine rep       CN0005303       Drum replacement required       HOP001       Hope Works (Pty) Ltd       Requisition Required       INST         Service Request       4       X	WOCo	ode	WODesc	ription		SourceRef	Source	Desc		CustomerCode	CustomerNa	me	DeptCode	DeptName	SourceType	ProcessStatus	WorkCode
Service Request	P #00		R B C			R <b>E</b> C	1 <b>0</b> 0			REC	REC		8 <b>8</b> 0	* <b>0</b> ¢	REC	* <b>0</b> ¢	8 <b>0</b> 0
Are you sure you want to edit this service INST on WO WO0006259?      S     Ves     No	WO	00006259	Post Con	tract ma	achine rep	CN0005303	Drum re	placeme	nt required	HOP001	Hope Works	(Pty) Ltd				Requisition Required	INST
						?	Are yo	u sure y	ou want to	edit this service			?				
									-			140					



- 6. The *Third Party Services* screen will be displayed.
- 7. Make the necessary changes to the third party service.
- 8. Click on *Save*.

		6	Third	Party Servic	es - BPO: Version 2.5.0.7	- Example Comp	any v2.5.0.7					x
Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Ser	vice Reporting	Utilities	- 6	7 X
Save Back												
	-8											\$
Process a												~
Work Order	WO0006259											
Service	INST		* ٩									
Description	Installation Fee				* *							
					w.							
Quantity	1.00 🗘 *											
Price	1,200.00 *											
Assigned To	Jeff Rivers		•									
Required Date	03/03/2022 -											
Billable	$\checkmark$											
Comment	Installation requied for	new printer to	be installed.		*							
					+							
0							11	00/00/00000		-		
Open Windows 🕶							User : JulandaK	28/02/2022	Version : 2.5.0.7	Example Cor	mpany v2.5.0	11

- 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*.



\$ = <u>9</u> -	Service Request	s for WO Code WO0006259	- BPO: Version 2.5.0.7 -	Example Company v2.	5.0.7		_	
Home Equipment / Location	ons Contract Finance / HR	Inventory Maintenance	/ Projects Manufacturin	g Procurement S	ales Service	Reporting	Utilities —	₽ ×
Add     Edit     Delete     Back     Sav	e Layout Workspaces Requisitor	Durban	Refresh Export					
Maintenance	Format A Proc	ess " Curre	nt a Print a					$\diamond$
Drag a column header here to group by tha								
WOCode WODescription	SourceRef	SourceDesc	CustomerCode	CustomerName	DeptCode	DeptName	Sour	ceType
▼ #0: #0:	1 <b>0</b> 4	s 🖸 c	* <b>0</b> :	8 🖬 C	R C	H <b>E</b> C	* <b>=</b> ¢	
WO0006259 Post Contract machin	ne rep CN0005303	Drum replacement required	HOP001	Hope Works (Pty) Ltd				
	Service Proces	vice Request on WO : WOODC	X 6259 complete. ► OK					

- 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.

<b>7</b>						Servio	e Reques	s for WO	Code WOO	006259	- BPO: Versio	n 2.5.0.7 -	Example Com	pany v2.	.5.0.7					
	Home	Eq	uipment / I	ocations	Contract	Fina	ance / HR	Inventor	y Maini	tenance /	Projects I	Manufacturin	ng Procurem	ent S	ales Ser	vice Repor	ting	Utilities	-	8
dd	Edit	X Delete	G Back	Save Layo	ut Works	spaces	Requisitio	Bilable	Durban	1	• Refresh	Export								
	Mainten	ance	4	F	13 <sub>t</sub>	4	Proc	ess .		Currer	nt	Print .								
WOCo			Description		SourceF	lef		SourceDe	isc		CustomerCod	e	CustomerNam	e	DeptCode	DeptNan	ne		Source	Type
* <b>0</b> ¢		# <b>B</b> C			REC			4 <b>0</b> 0			* <b>D</b> ¢		e C		REC	REC.			* <b>D</b> ¢	
• wo	0006259	Post	t Contract	nachine rep.	. CN0005	303		Drum rep	lacement re	quired	HOP001		Hope Works (	Pty) Ltd				_	1	2



#### **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.

± +				Set	vice Reques	ts for WO C	ode W00006259	- RPO: Versio	n 2.5.0.7 -	Example Company v2	5.0.7			_ • ×
	Home	Equipment / I	ocations		Finance / HR	Inventory		/Projects N				e Reporting	Utilities	- & ×
	2	elete Back	Save Layou	t Workspace	<b></b>	n Billable	Durban	• Refresh	Export					\$
WOCode		WODescription	1	SourceRef		SourceDes	sc	CustomerCode		CustomerName	DeptCode	DeptName		SourceType
9 #Dc		8 <b>8</b> 0		REC		R C		• <b>B</b> ¢		* <b>0</b> 0	REC	R C		800
. wood	006259	Post Contract	machine rep	CN0005303		Drum repla	acement required	HOP001		Hope Works (Pty) Ltd				
▶ = WO00	06259	Post Contract	machine rep	CN0005303		Drum repla	acement required	HOP001		Hope Works (Pty) Ltd				
					Are you sure y	rou want to	remove this serv	Yes	No	9?				
•														,
Open Wind	ows 🔻									User : JulandaK	28/02/2022	/ersion : 2.5.0.7	Example Com	pany 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

Ŧ					Se	ervice	Request	s for WO C	ode WO	000625	9 - BPO: Ve	ersion	.5.0.7 - E	.xample coi							
Home	Equipm	ient / Loo	ations	Contr	act	Financ	e / HR	Inventor	/ Mai	ntenance	e / Projects	Mar	ufacturing	Procure	ment	Sales	Service	Reporting	Utilities	-	8 3
d Edit		ack	ave Layo	ut W	orkspac	tes i	Requisition	Billable	Durba	an,	• Ref	2 Tresh	Export								
	-	-	7		*																
Maintena	nce		<b>F</b>	ormat			Proc	ess ,		Curr	ent	4	Print 💷							-	
gnedTo		ssignedT	EmplNo				nedToNa	me	Quar	ntity	Estimated	Price		TotalCost	Actu	alCost		Billable	Comments	Statu	JS
	я	c				REC			=		-			=	=			R C	REC	RBC	
	22 E	987654					Rivers				1		1,200.00	1,200.00	D		0.0	0 Yes	Installation		
	511 K	ES001				Jular	ida Kessle	r		1	1		350.00	350.00	D		0.0	0 Yes		С	
																			(	6	*
																				6	
																				6	
																				5	*
																				6	*
±n Windows ♥																			( Example Comp	6	*

#### **EXPORT**

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

Ψ.	Ŧ		E Comise Denne	ests for WO Code WO0006259	BDO Version 2 F 0 7	European Commence 2	E 0 7			
		Equipment / Locations								
-	Home	Equipment / Locations	Contract Finance / HR	Inventory Maintenance	/ Projects Manufacturii	ing Procurement S	Sales Service	e Reporting	Utilities —	D <sup>2</sup>
A	dd Edit D	elete Back Save Layou	it Workspaces Requisit	tion Billable	Refresh Export					
	Maintenan		rmat Pr	ocess Curre	nt Print	J				
-	Maintenan	ce a ro	emat a Pr	ocess al Curre	nt a Phnta	4				
1	WOCode	WODescription	SourceRef	SourceDesc	CustomerCode	CustomerName	DeptCode	DeptName	Sour	rceType
	• <b>B</b> ¢	8 D C	8 C	R C	10c	A D C	8 C	# 🗖 c	s 🖬 c	
	WO0006259	Post Contract machine rep	CN0005303	Drum replacement required	HOP001	Hope Works (Pty) Ltd				
Ē	WO0006259	Post Contract machine rep	CN0005303	Drum replacement required	HOP001	Hope Works (Pty) Ltd				



- 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.

<b>₽</b> 5°°°	÷	Servio	e Requests for WO Code WO0	006259_28-Feb-2022_04-3	7-50 - Excel	Julanda Kessler 📕		
File Home	Insert Page Layout F	ormulas Data Revie	v View Help Team	Q Tell me what you	want to do		5,	우 <sub>4</sub> Share
- L 🖻 🗸 🗠	alibri • 11 • 3 I ∐ •   ⊞ •   & Font		€ ¥ 🛱 × 🗣 × १	, •0 .00 Cond	itional Format as Cell tting ~ Table ~ Styles ~ Styles	Insert ∽ Delete ∽ Format ∽ Cells	∑ · AZT Sort & Find & Filter - Select - Editing	
A1 -	$: \times \checkmark f_x \lor v$	WOCode	<b>↑</b>					~
Α	В	С	D 4	E	F	G	н	L
	-	-				DeptCode - Dept		
2 WO0006259	Post Contract machine r		Drum replacement requir		Hope Works (Pty) Ltd			Jurcery
3 WO0006259	Post Contract machine r		Drum replacement requir		Hope Works (Pty) Ltd	3		
1								
5								
5								
7								
8								
9								
0								
1								
2								
3								
4								
15								
16								
17								
18								
19								
She	et (+)	1	1		II [∢]			
	0							
eady (🎲 Accessibi	lity: Good to go							+ 100%

#### **Related Topics**

Service Requisition

MNU.072.011