

SERVICE

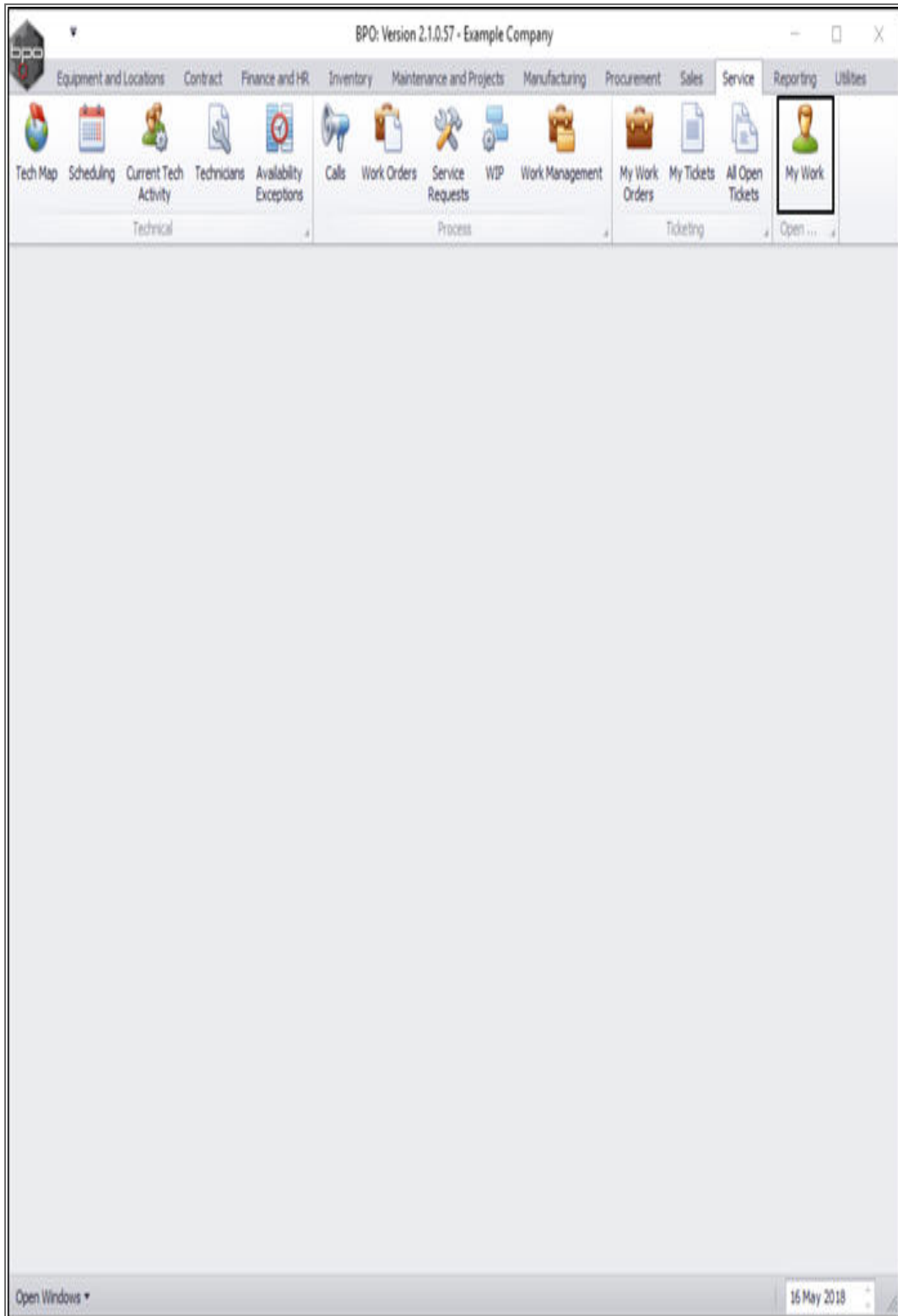
MY WORK – ADD AN INTERNAL SERVICE REQUEST

The **My Work** screen deals with work that is assigned to a specific employee, i.e. when an employee is logged in, that employee can only see work orders assigned to themselves.

This screen has similar functionality to the call screen in that the employee can request parts, **services** and loan units, book time, travel and expenses, view customer and machine details (including warranty information).

The employee can raise any **non-stock** services provided to a client(s) by logging an **Internal Service**.

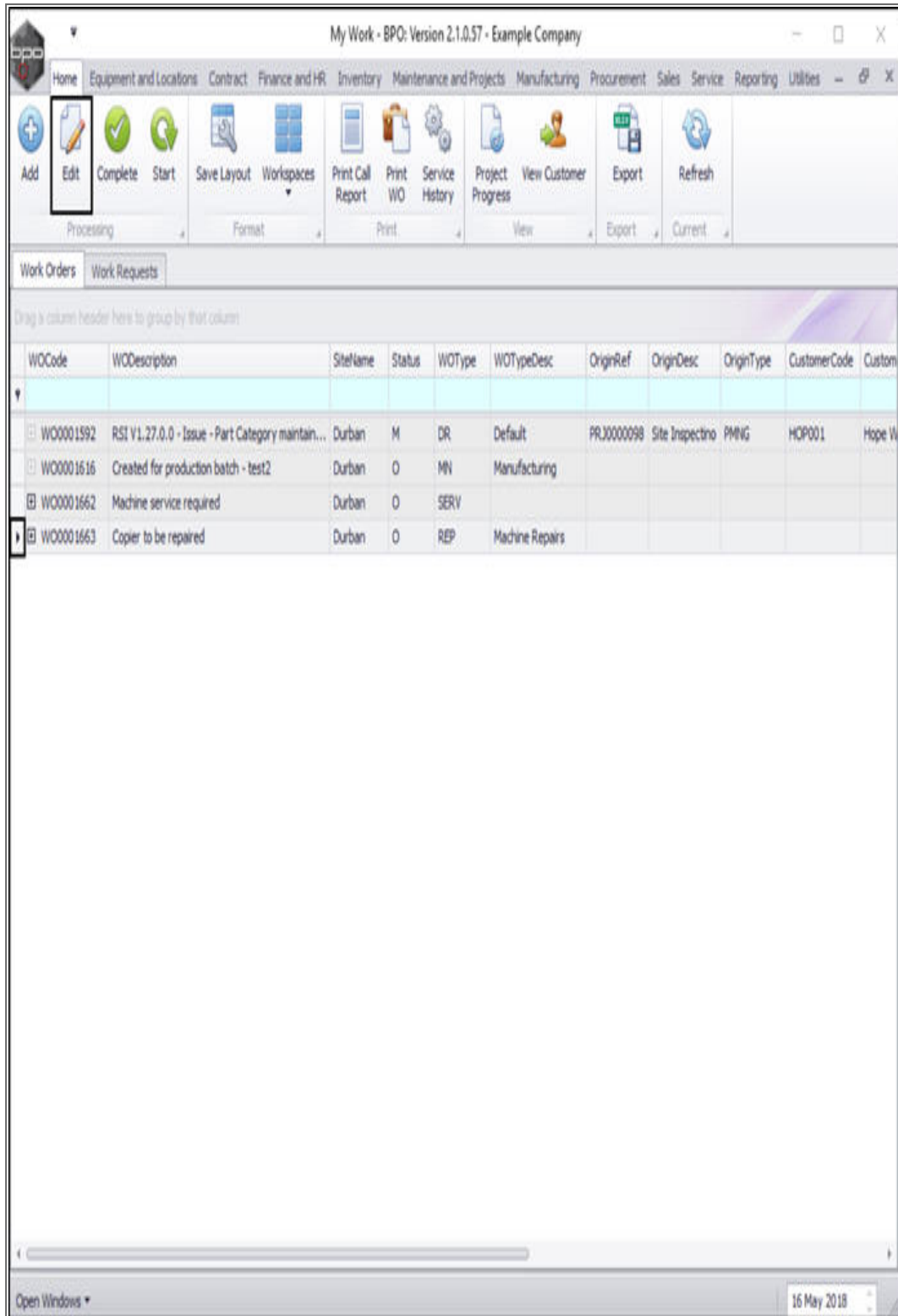
Ribbon Access: *Service > My Work*



The **My Work** listing screen will be displayed.

Either

- Click on the **row selector** in front of the **work order** where you wish to add a **service request**.
- Click on **Edit**.



The **Maintain WO - Ref []** screen will be displayed.

- Click on the **Services** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.57 - Example Company' window. The interface includes a top navigation bar with various modules like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with Save, Back, Save Layout, and Print buttons. A left-hand sidebar contains a 'Functions' menu with tiles for Time, Services (highlighted in orange), Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The main workspace is divided into several sections:

- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** 0 - Open
- Billable:**
- Capitalise:**
- Work Order Item:**
 - Functional Location: Equipment
 - Item: 19-12345
 - Comment: (empty text area)
- Links:**

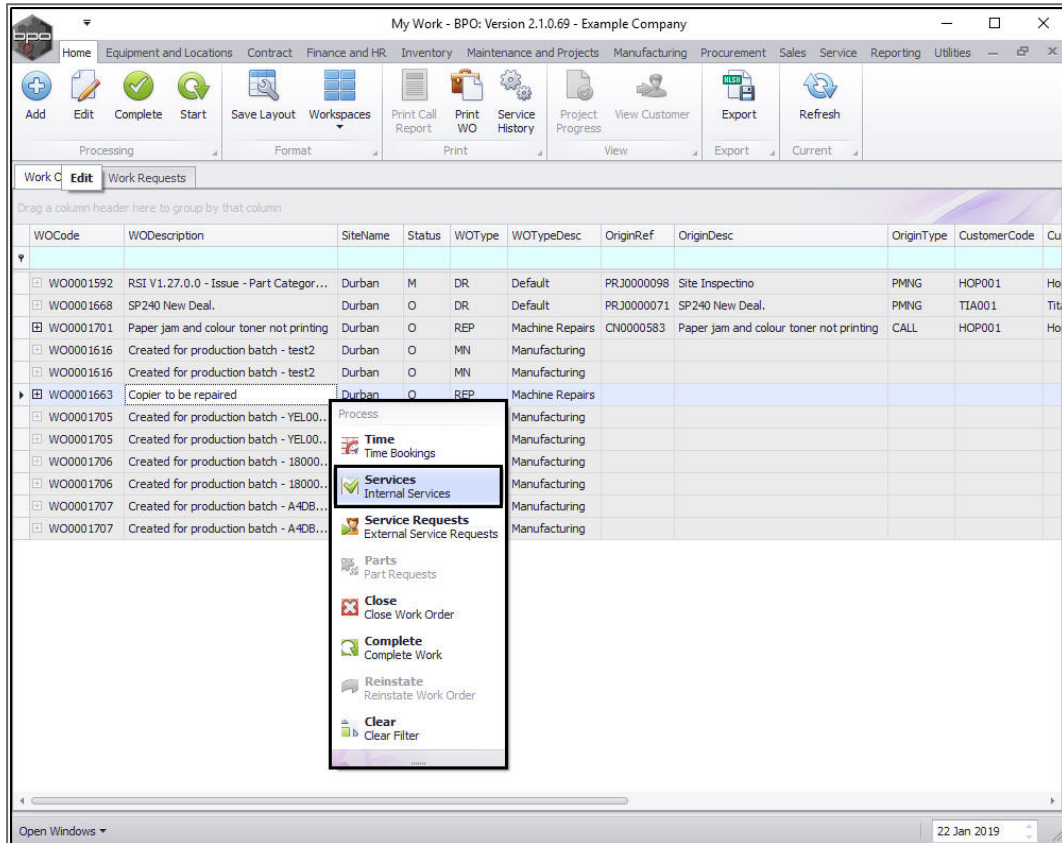
RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
 - Assigned To: Abigail Mine
 - Assigned By: Abigail Mine
 - Scheduled Start: 15 May 2018 10:40:29
 - Scheduled End: 14 Jun 2018 00:00:00
 - Actual Start: 14 Jun 2018 00:00:00
 - Actual End: 14 Jun 2018 00:00:00
 - Delay Comments: Currently on Schedule
 - Rectification Code: (empty dropdown)
 - Rectification Comments: (empty text area)
 - Completion Date: 14 Jun 2018 00:00:00

At the bottom of the window, there is a 'Meters' section and an 'Open Windows' dropdown menu. The system date is shown as 16 May 2018.

Or

In the **My Work** listing screen,

- **Right click** anywhere in the **row** of the **work order** where you wish to add a **service** request.
- A **Process** menu will pop up.
- Click on **Services** - Internal Services.



Either process will bring you to the **Internal Services for WO Code []** screen.

- Click on **Add**.

Internal services for WO Code W00001663 - BPO: Version 2.1.0.57 - 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 | Export | Refresh

Processing | Format | Print | Cut...

Drag a column header here to group by that column

ServiceCode	ServiceDescription	Quantity	Price	Billable	Status

Open Windows | 16 May 2018

- The **Internal Service** screen will be displayed.
 - **Work Order:** This field will auto populate with the initially selected work order.
 - **Service:** Click on the search button and select from the pop up screen the non-stock internal service (e.g. **Call Out Fee**) that you wish to link to this work 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 according to what's set up on the selected service but you can type in a new price if applicable.
 - **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.

Internal Service - BPO: Version 2.1.0.57 - Example Company

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

Save Back

Process

Work Order W0001663

Service *

Quantity 1 *

Price *

Billable

Open Windows 16 May 2018

- When you have finished adding the internal service details, click on **Save**.

Internal Service - BPO: Version 2.1.0.57 - Example Company

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

Save Back

Process

Work Order W0001663

Service CALL

Call Out Fee

Quantity 1

Price 100.00

Billable

Open Windows 16 May 2018

- You will return to the ***Internal services for WO Code []*** listing screen screen where you can now view the newly logged internal service.
- A ***Service Processing*** message box will pop up informing you that;
 - ***Service Inclusion on WO: [] complete.***
- Click on ***OK***.

ServiceCode	ServiceDescription	Quantity	Price	Billable	Status
CALL	Call Out Fee	1	100.00	No	A

Service Processing

Service inclusion on WO : WO0001663 complete.

OK

MNU.073.003

