

SERVICE

MY WORK – ADD A THIRD PARTY SERVICE REQUEST

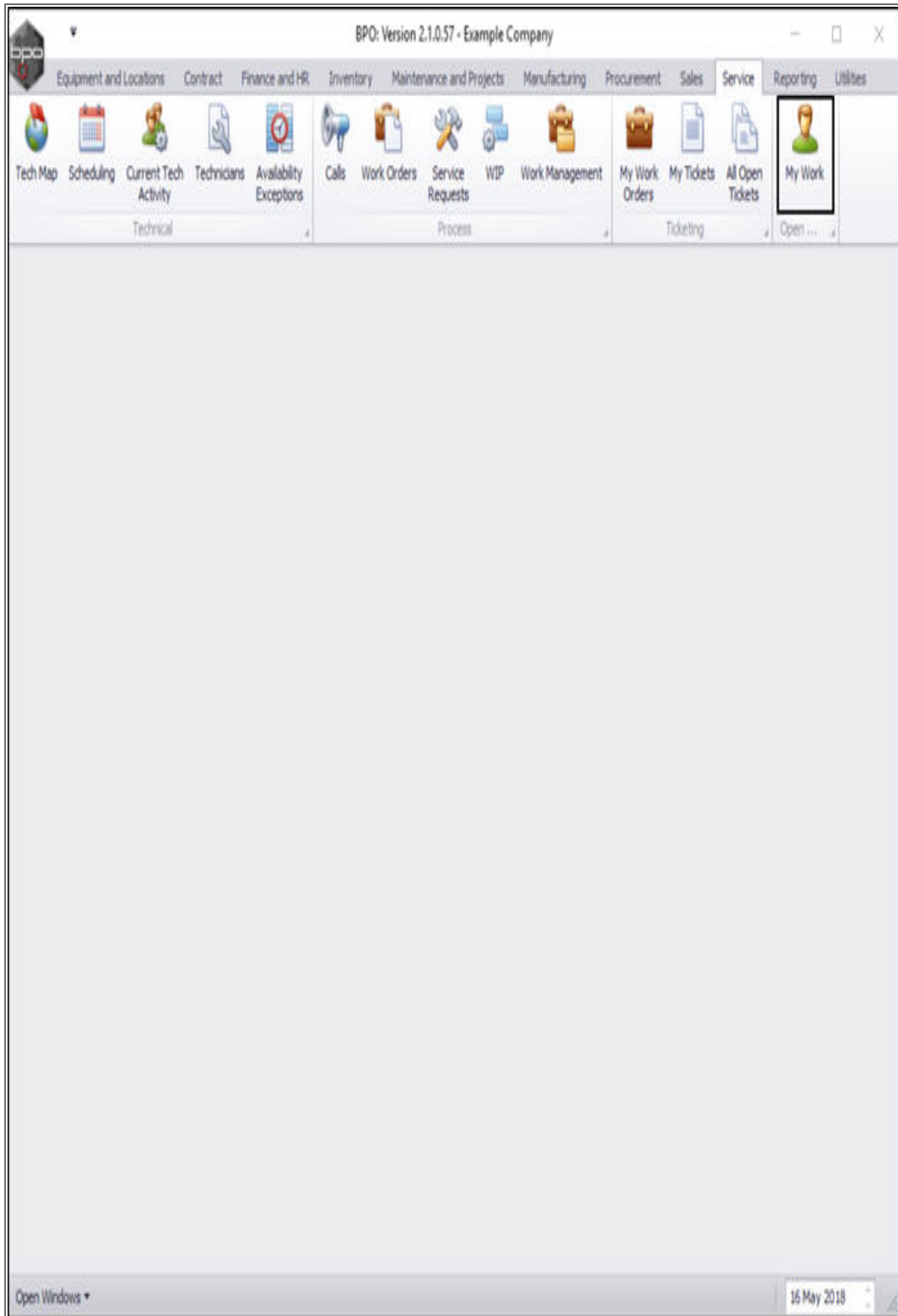
You will need to raise an **external** or **Third Party Service Request** when a supplier is required to provide a **service** for a work order.

From this Third Party Service Request, you can start a Non-Stock Procurement cycle:

- i. Raise a Purchase Order to the Supplier/Dealer
- ii. Raise a Non-Stock Goods Received Note
- iii. Create a Supplier Invoice.

The list of services you can select and request are set up in **Services**.

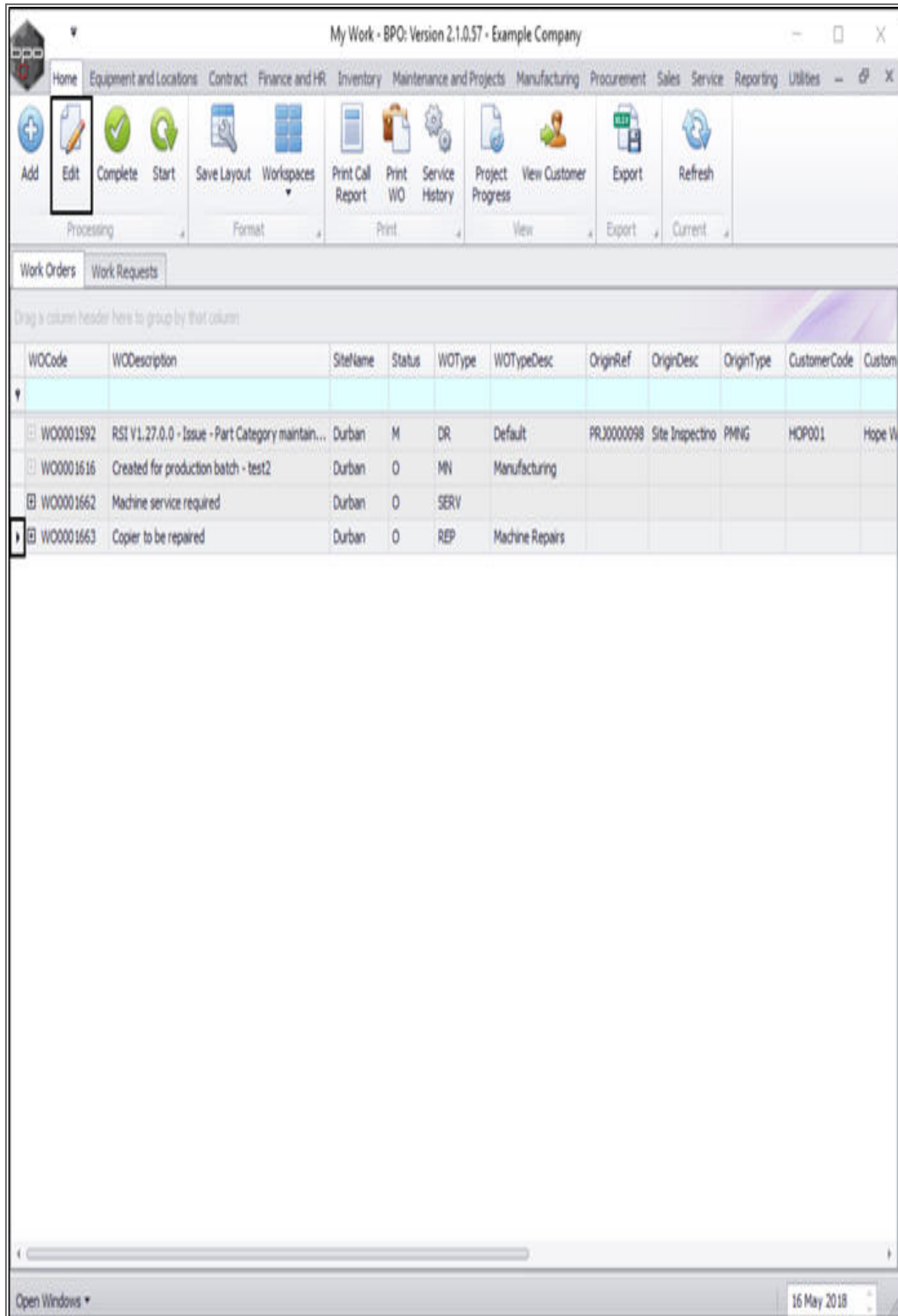
Ribbon Access: *Service > My Work*



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

Either

- Click on the **row selector** in front of the **work order** that you wish to log a **third party** or **external service request** for.
- Click on **Edit**.



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

- Click on the **Third Party Services** tile.

The screenshot shows the CO3 software interface for maintaining a Work Order (WO). The title bar reads 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.57 - Example Company'. The top navigation bar includes '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 secondary toolbar has 'Maintain' and 'Format' buttons.

The left-hand 'Functions' menu is visible, with the 'Third Party Services' tile highlighted. Other tiles include 'Time', 'Services', 'Parts', 'Loans', 'Swap Outs', 'Meters', and 'Expenses'. The 'Links' section at the top left has a search box.

The main form area is divided into several sections:

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

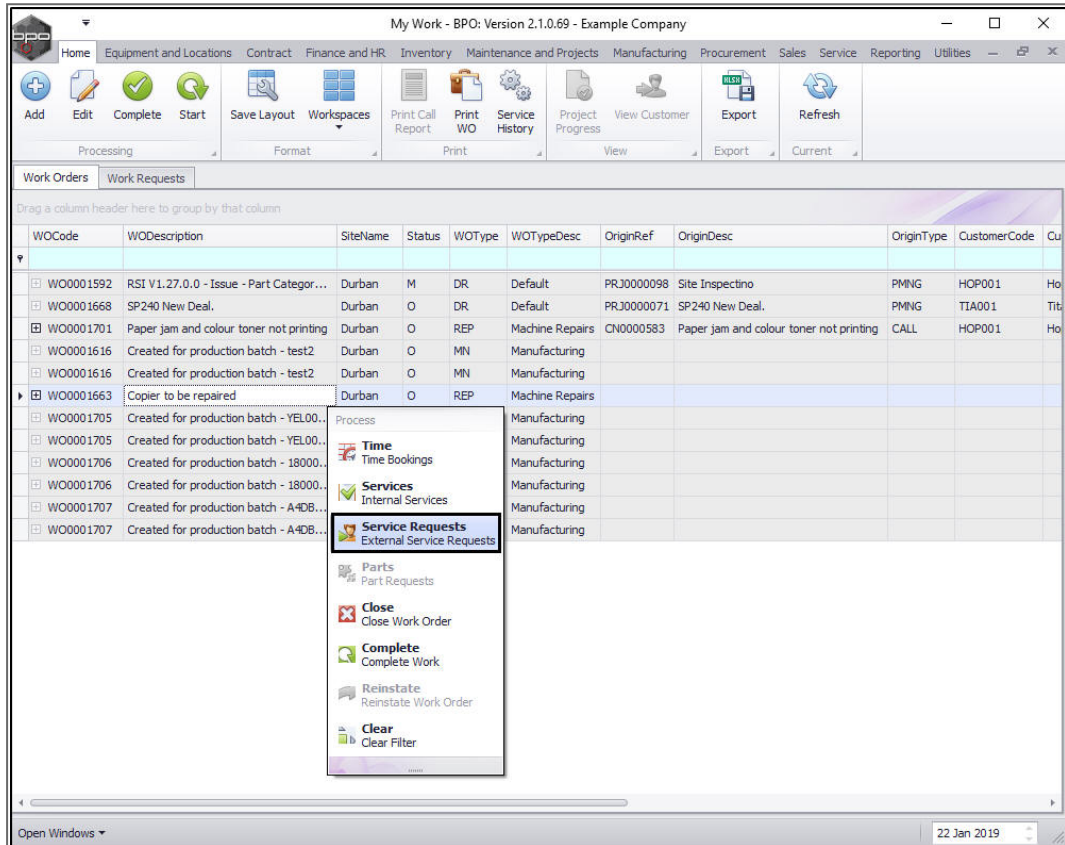
RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PRNG	Project Reference	
- Schedule:**
 - Assigned To: Abigal Mine
 - Assigned By: Abigal Mine
 - Scheduled Start: 15 May 2018 10:40:29
 - Scheduled End: 14 Jun 2018 00:00:00
 - Actual Start: 14 Jun 2018 00:00:00
 - Actual End: 14 Jun 2018 00:00:00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

The bottom status bar shows 'Open Windows' and the date '16 May 2018'.

Or

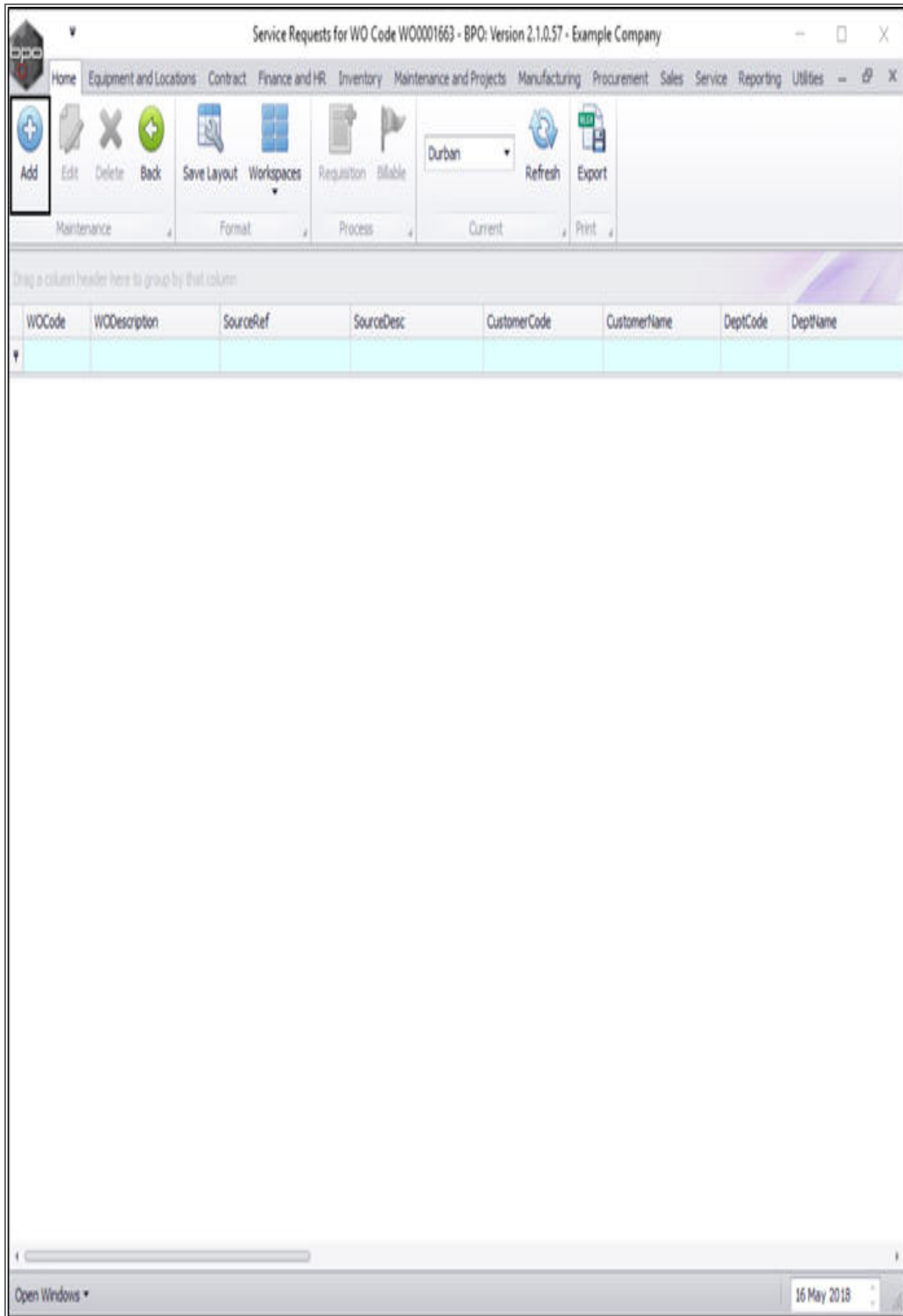
In the **My Work** listing screen,

- **Right click** anywhere in the **row** of the **work order** where you wish to log an **external service** request.
- A **Process** menu will pop up.
- Click on **Service Requests - External Service Requests**.



Either process will bring you to the **Service Requests for WO Code []** screen.

- Click on **Add**.



- The **Third Party Services** screen will be displayed.

- **Work Reference:** Click on the search button and select from the pop up screen, the service required.
- **Work Description:** The service description will populate with the description of the service selected in the previous step.
 - You can update this field with any additional information for the supplier, e.g. serial number - as this detail will pull through to the purchase 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 with what's set up on the selected service but you can type in another price if applicable.
- **Required Date:** This will default to the current date.
 - Either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Assigned To:** This will populate with the person currently logged on to the system.
 - You can click on the drop-down arrow and select an alternative person responsible for arranging the service, if required.
- **Is 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.
- **Comment:** Type in a comment regarding this external service request, if required.

Third Party Services - 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: WO0001663

Service:

Description:

Quantity:

Price:

Assigned To: Abigal Mine

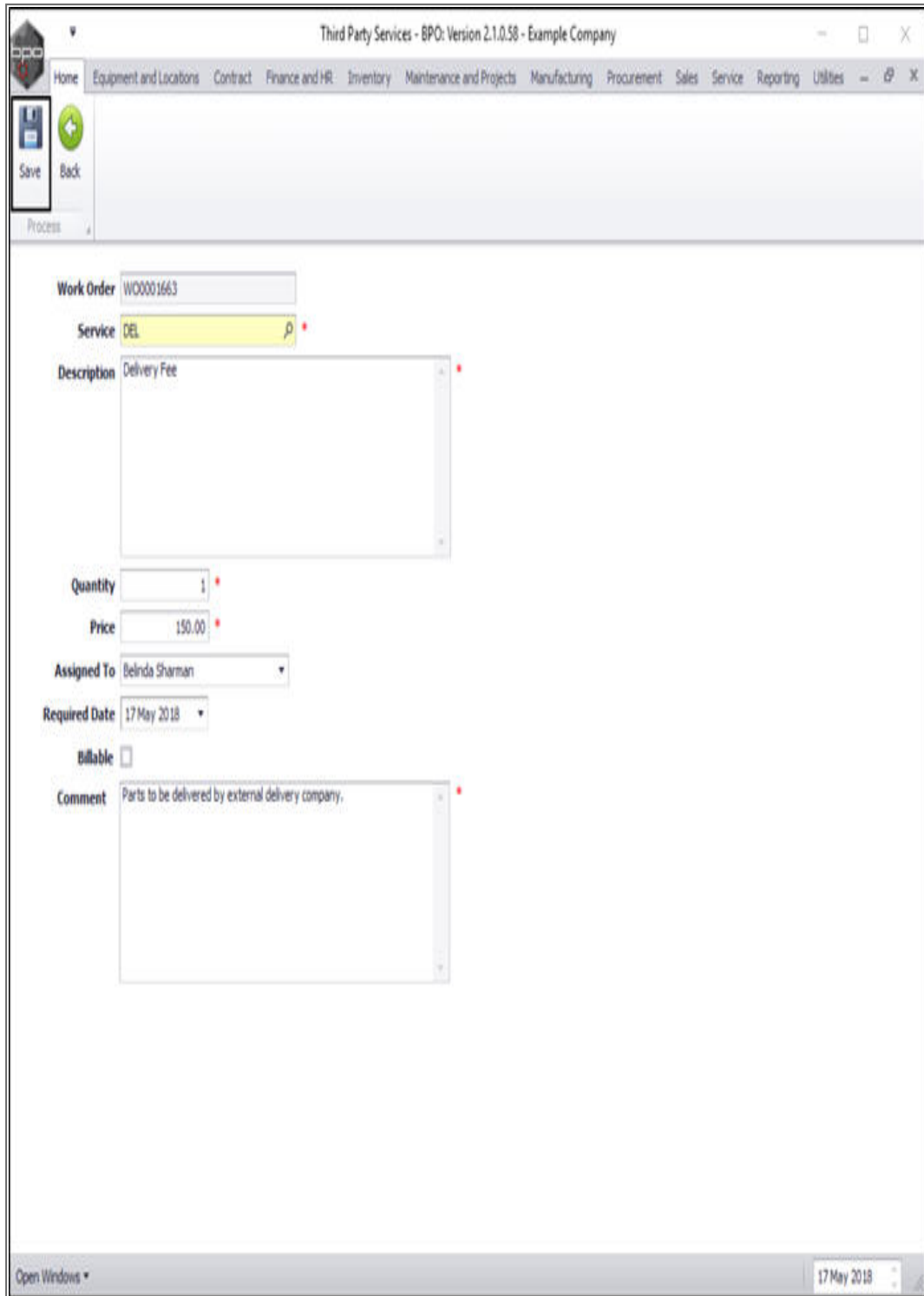
Required Date: 17 May 2018

Billable:

Comment:

Open Windows | 16 May 2018

- When you have finished inputting the third party service request details, click on **Save**.



Third Party Services - BPO: Version 2.1.0.58 - 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 WO0001663

Service DEL

Description Delivery Fee

Quantity 1

Price 150.00

Assigned To Belinda Sharman

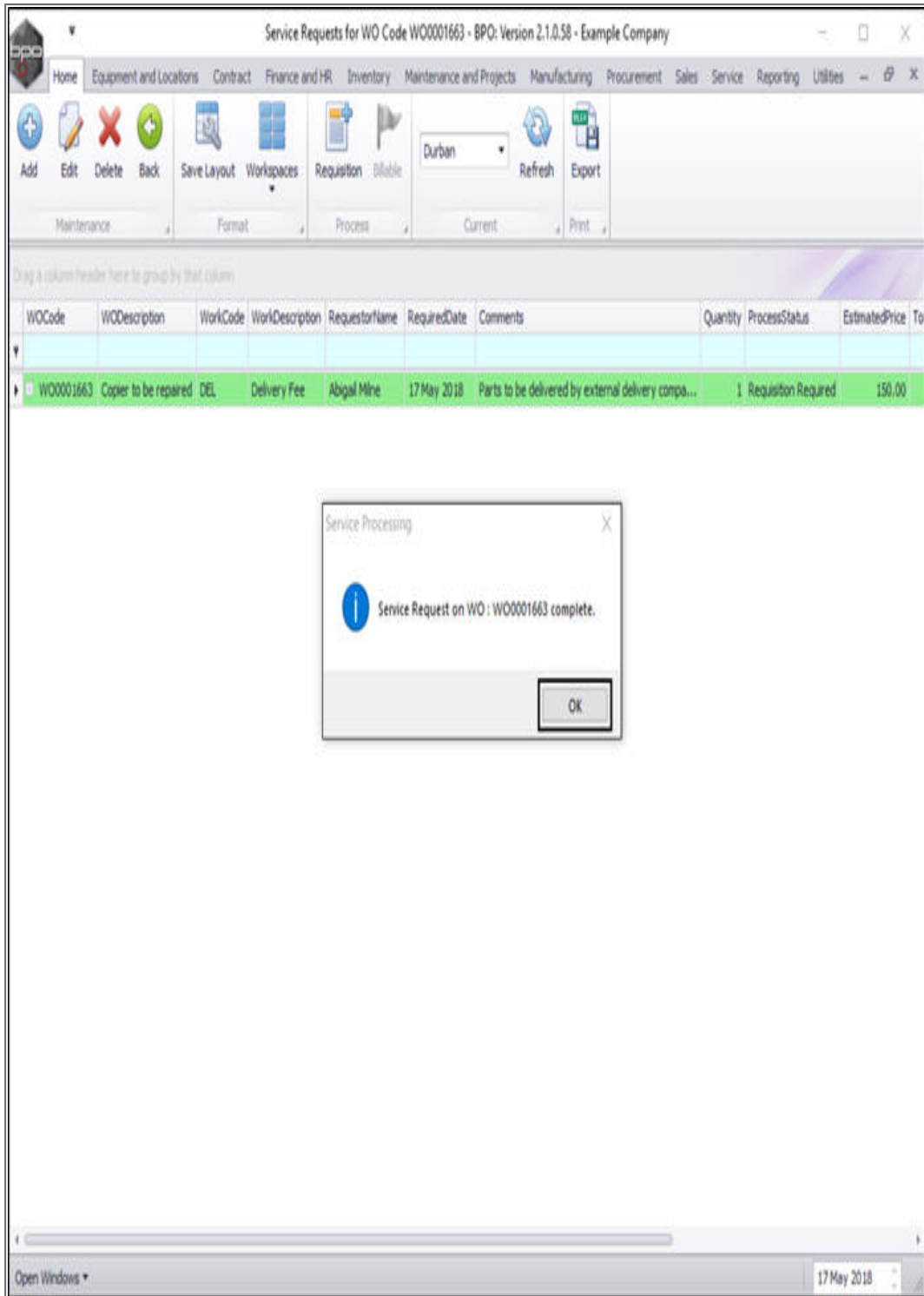
Required Date 17 May 2018

Billable

Comment Parts to be delivered by external delivery company.

Open Windows 17 May 2018

- You will return to the *Service Requests for WO Code []* screen.
- A *Service Processing* message box will pop up informing you that;
 - *Service Request on WO: [] complete.*
- Click on **OK**.



- You can now **view** the newly added service request in this screen.

Service Requests for WO Code WO0001663 - BPO: Version 2.1.0.58 - 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 Bifable Refresh Export

Durban

Maintenance Format Process Current Print

Drag a column header here to group by that column

WOCode	WODescription	WorkCode	WorkDescription	RequestorName	RequiredDate	Comments	Quantity	ProcessStatus	EstimatedPrice
WO0001663	Copier to be repaired	DEL	Delivery Fee	Abigail Mine	17 May 2018	Parts to be delivered by external delivery company.	1	Requisition Required	150.00

Open Windows 17 May 2018



Note that from BPO2 v2.5.0.14, you have the ability to add the same service (non-stock item) more than once to a purchase requisition, and change the item description to differentiate between them.

MNU.073.004