SERVICE

CALLS - REQUEST A PART FROM STORE

Parts Requests are raised in order 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 bought. A part request may be logged directly from a **Call**.

Depending on your company's configuration, the part request may need to be authorised before stores will receive the request and the stock can be issued.

One part request must be logged for each **part** required.

Ribbon Access: *Service > Calls*

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The ***Call Listing*** screen will be displayed.

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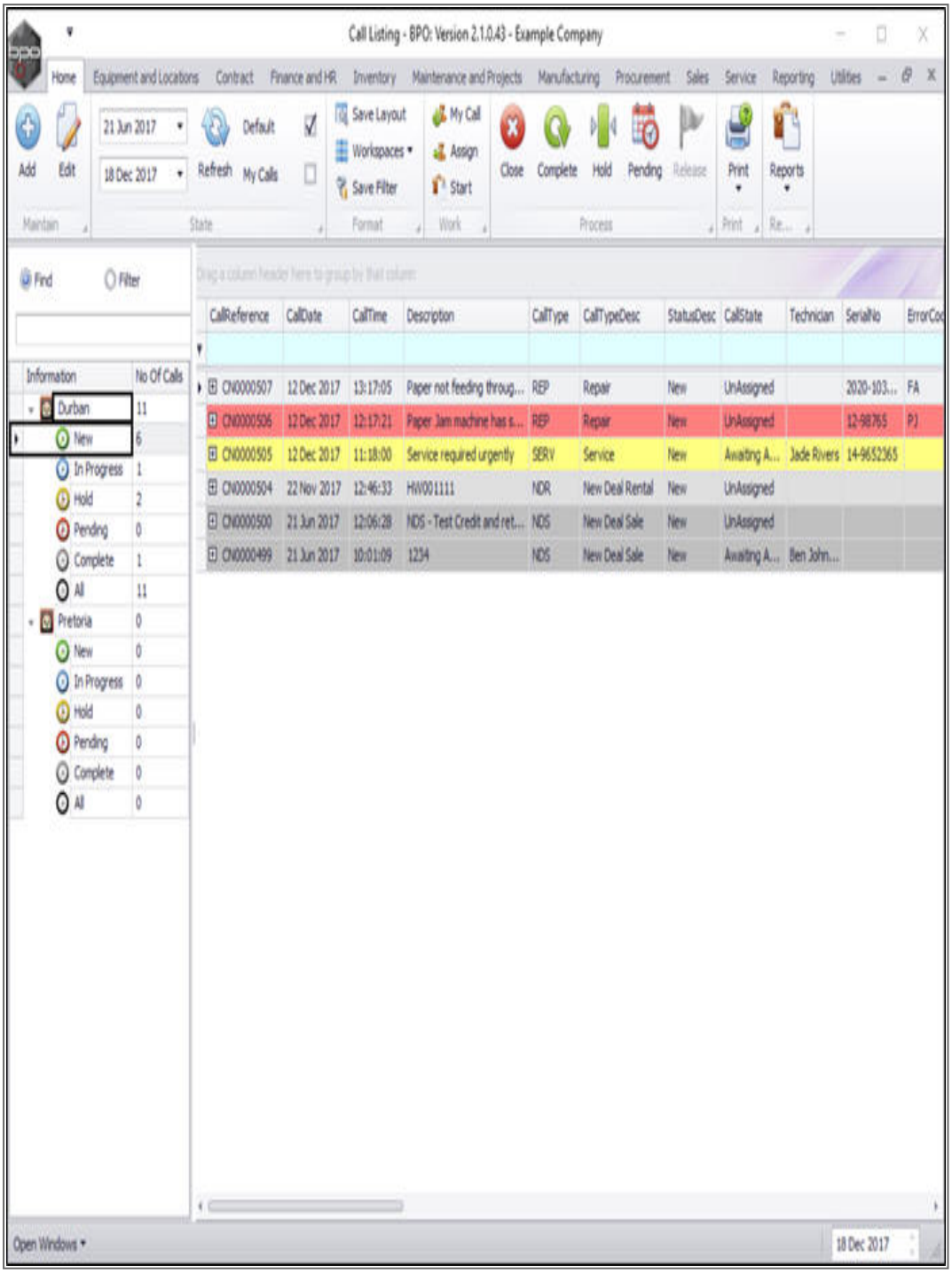
- Select the ***site*** and ***status***.
    - In this image, ***Durban*** has been selected as the site and the status has been set to ***New***.



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SELECT THE CALL

- Click on the ***row selector*** in front of the ***call*** you wish to ***request parts*** for.
- Click on ***Edit***.

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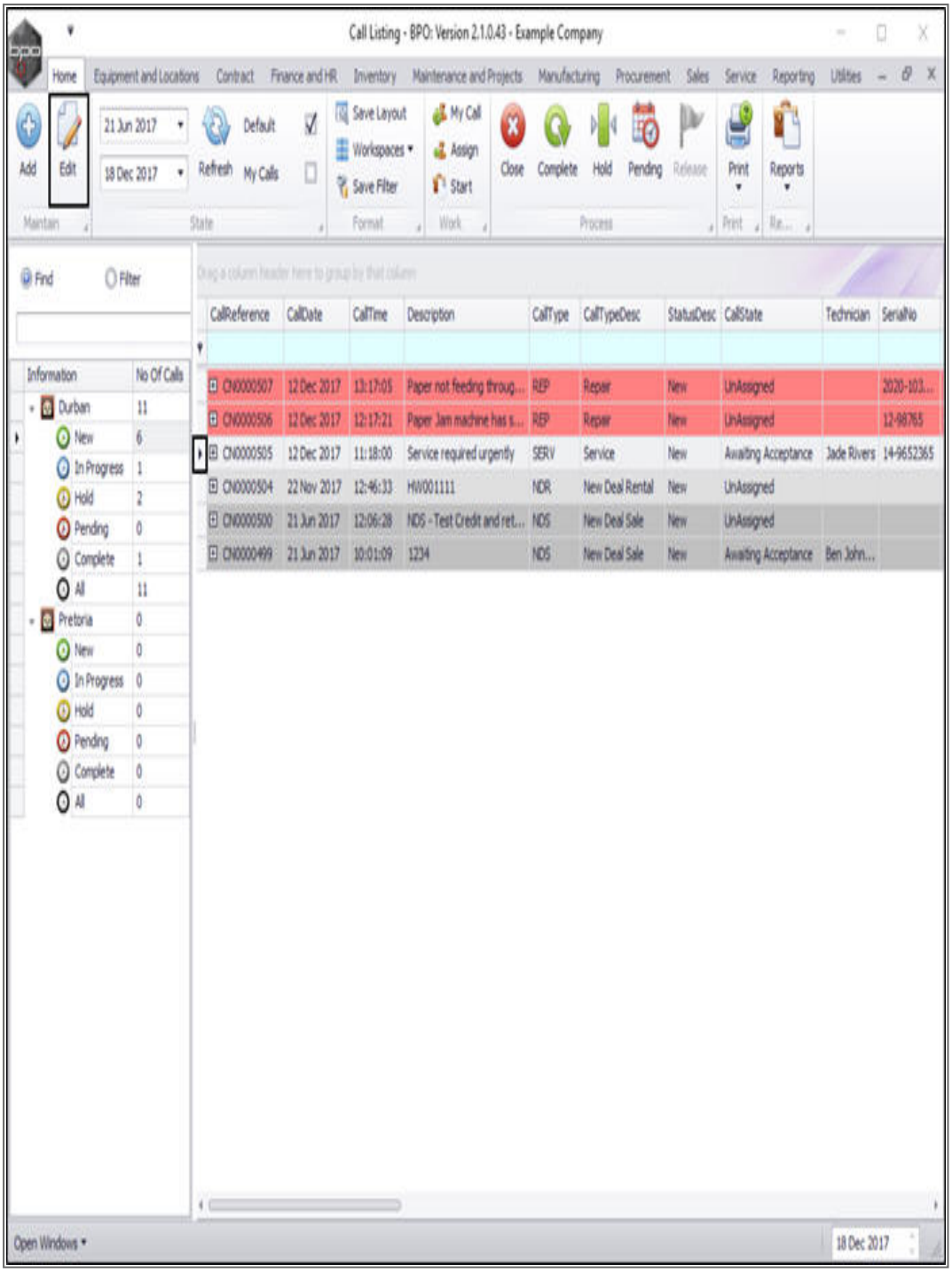

- The ***Call Maintenance: Call ref. - [ ]*** screen will be displayed.

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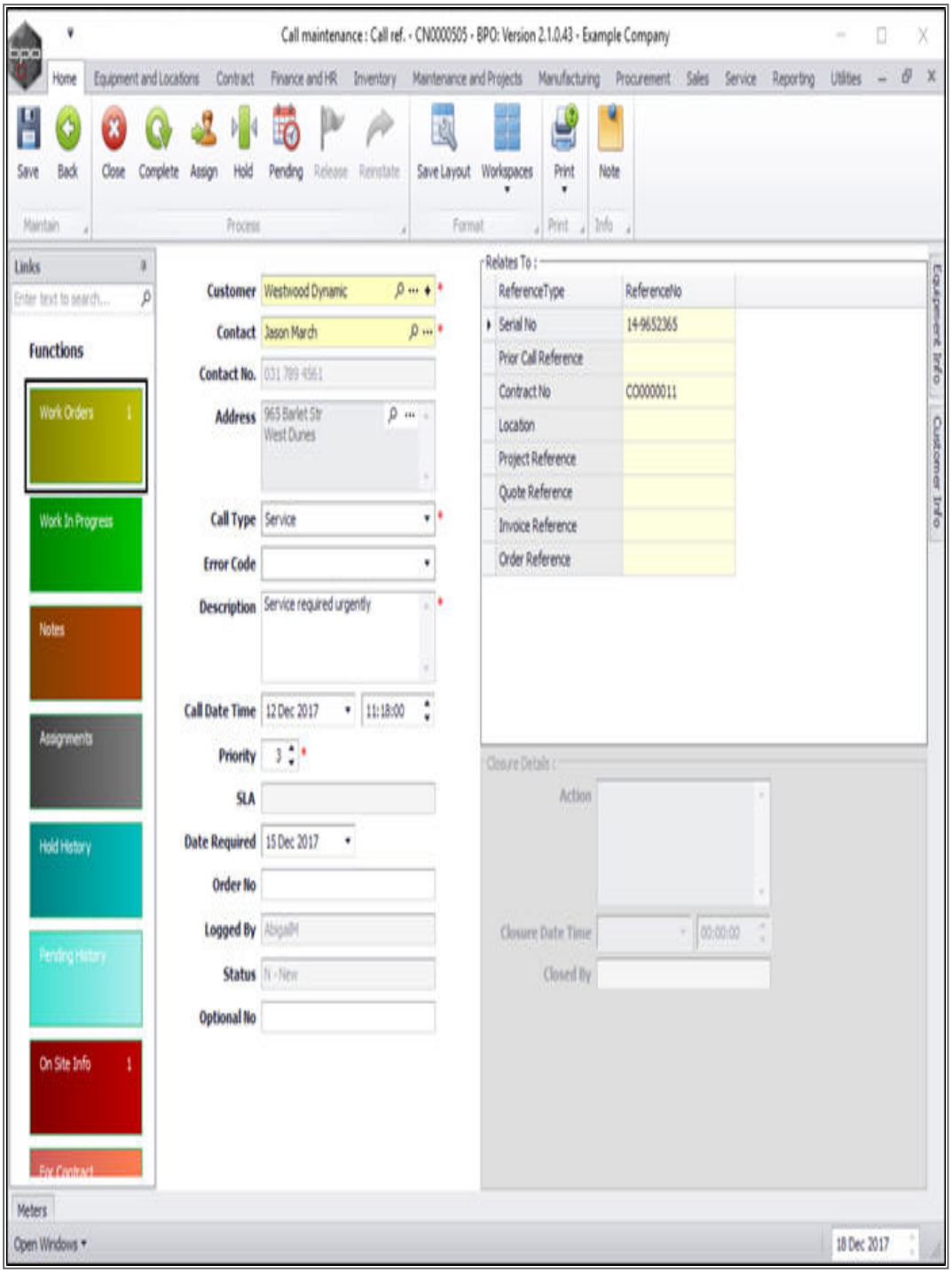
SELECT THE WORK ORDER (METHOD 1)

- Click on the ***Work Orders*** tile.



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- The ***Work Orders for Call Ref [ ]*** screen will be displayed.
- If there is more than one work order in this screen, select the work order that you wish to attach the part request to.
- Click on the ***Parts*** tile.

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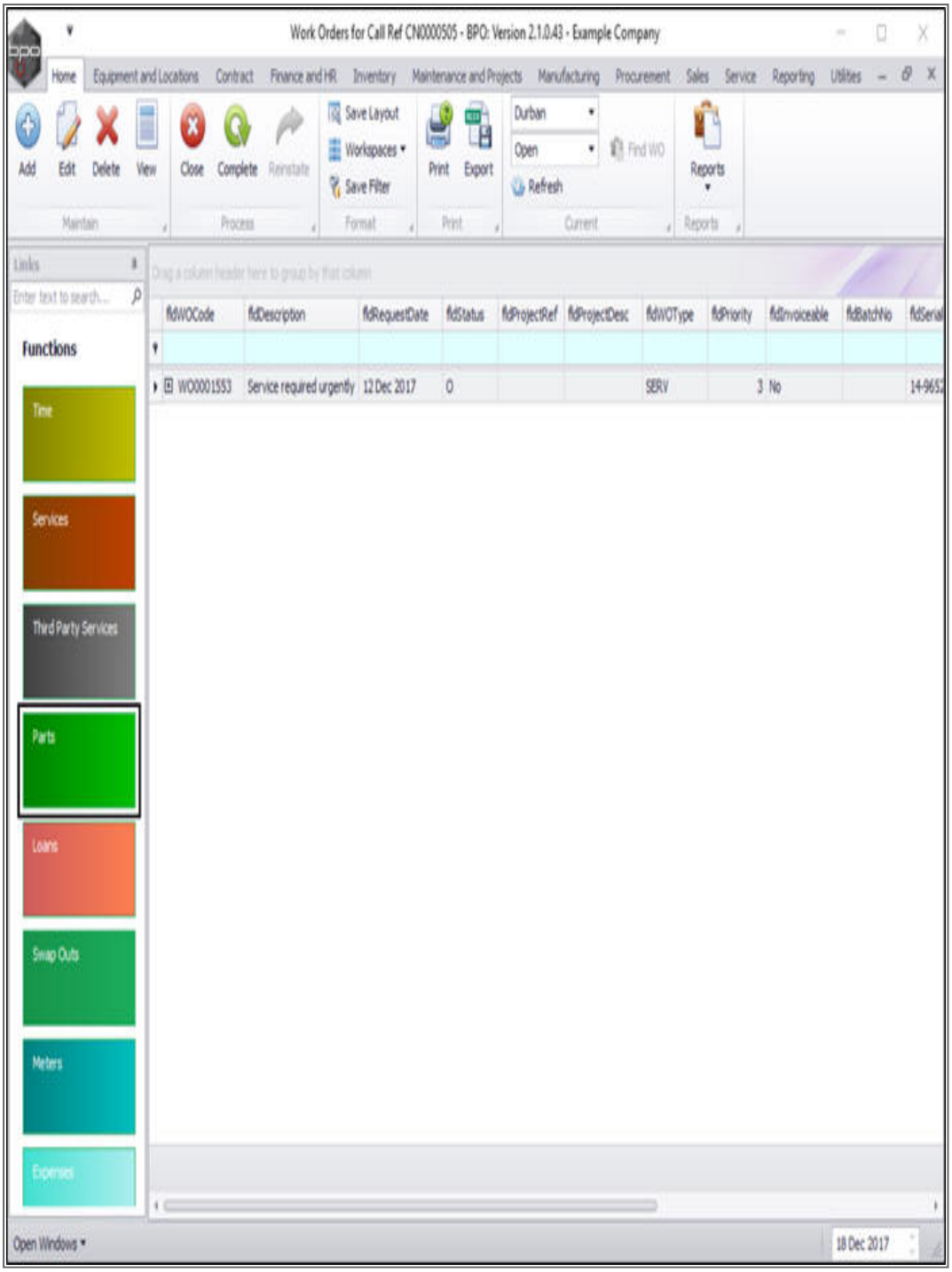

- The ***Part Requests for WO Code [ ]*** screen will be displayed.
- Click on ***Add***.

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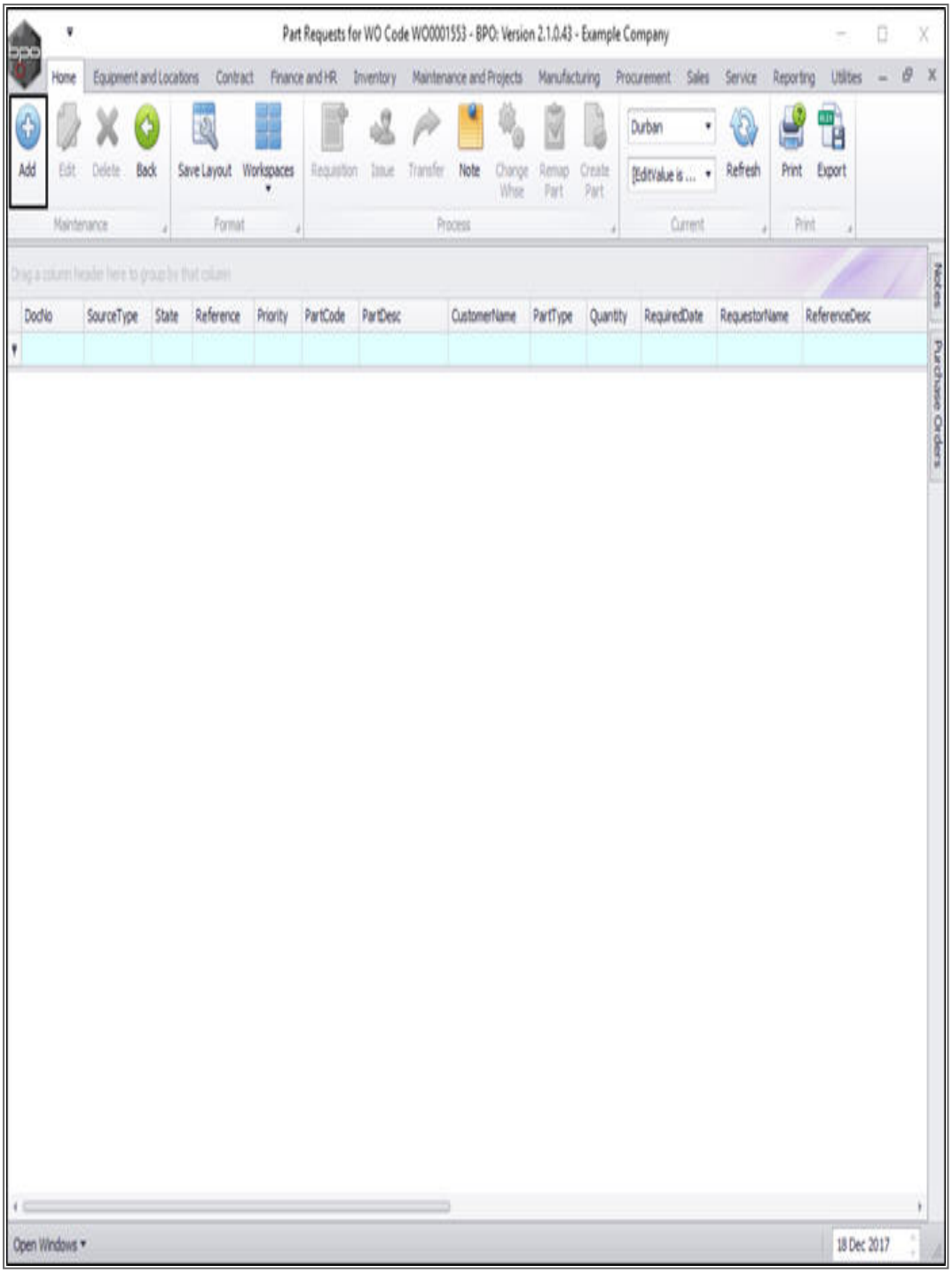

SELECT THE WORK ORDER (METHOD 2)

You can also reach this point by following a slightly different process.

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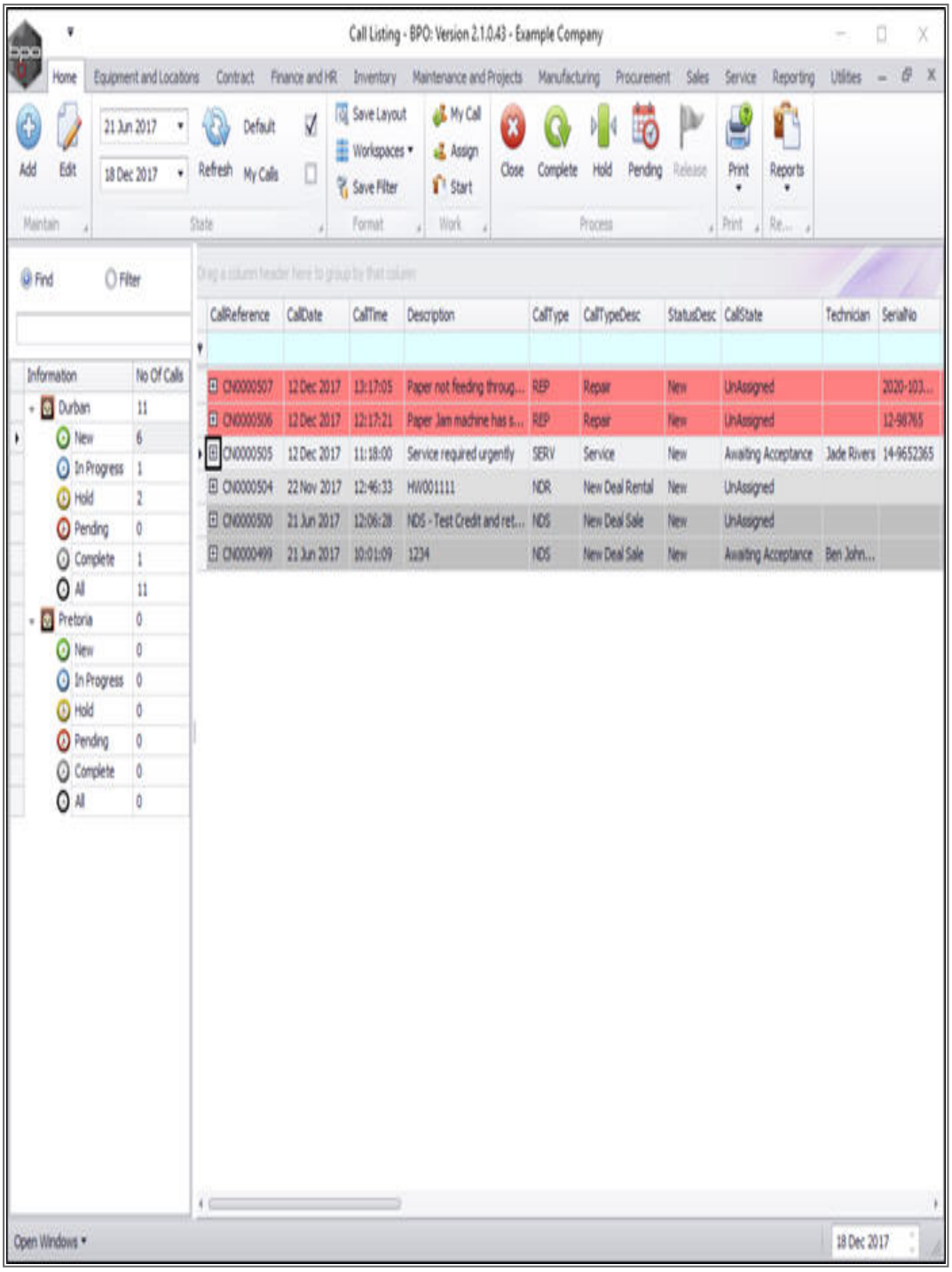
- In the ***Call Listing*** screen,
- Click on the ***expand*** icon in the row of the call that you wish to requests parts against.



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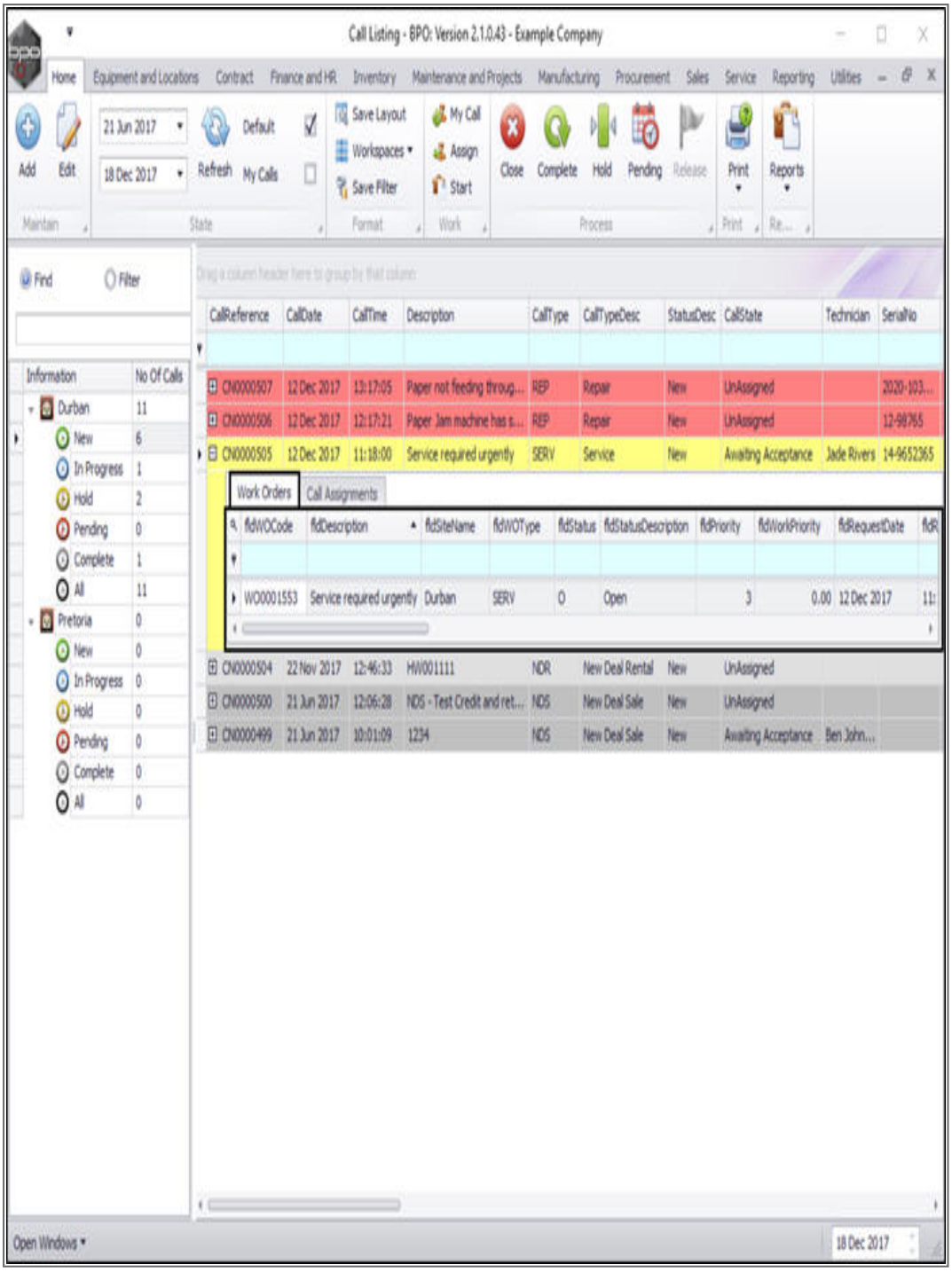
- The ***Work Orders*** data grid will be expanded.



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ADD THE PART REQUEST

- ***Right click*** anywhere in the ***row*** of the work order that you wish to link the Part Request to.
- A ***Process*** menu will pop up.
- Click on ***Parts*** *Add Part Request* in this menu.

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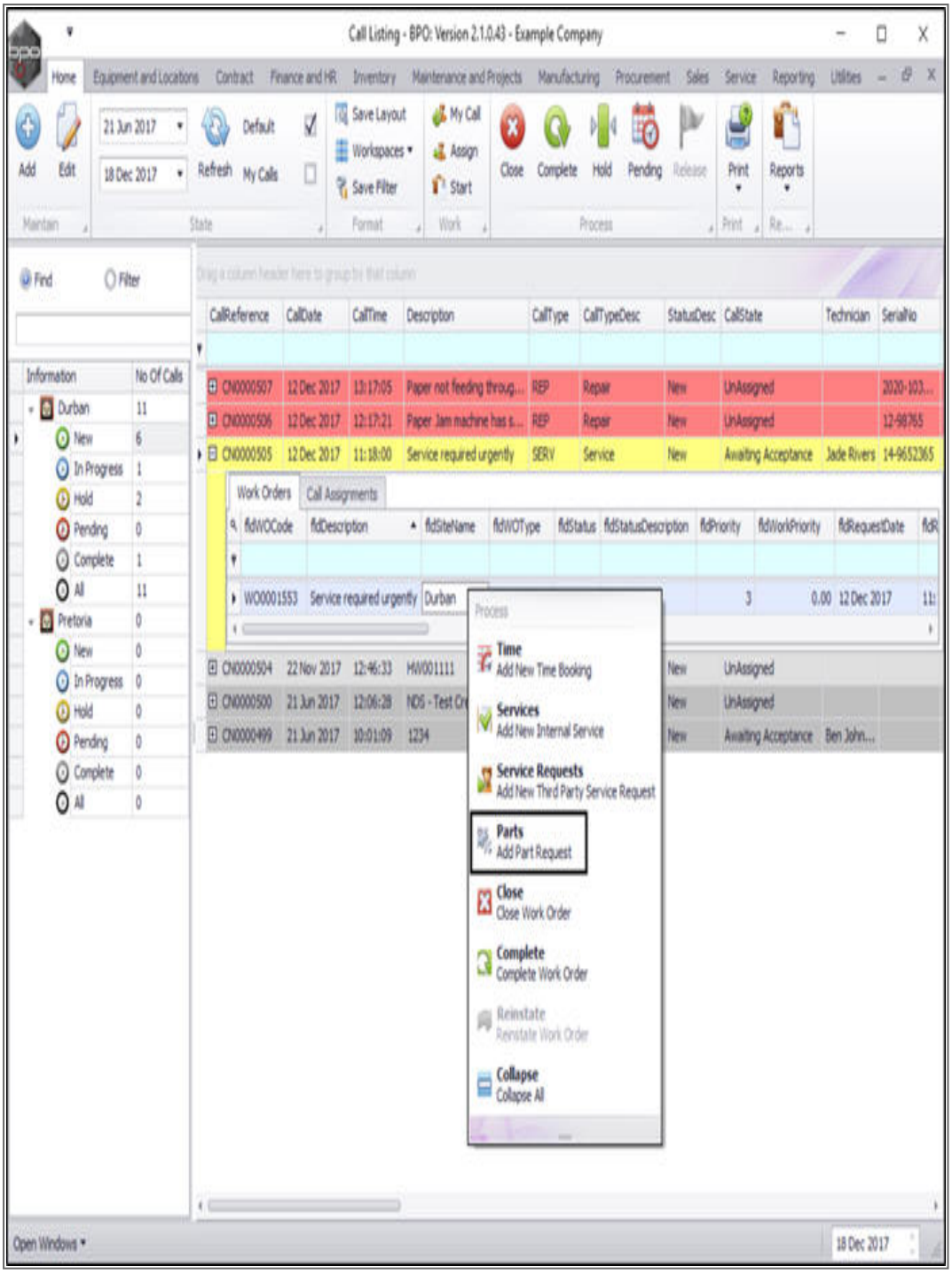

- The ***Part Requests for WO Code [ ]*** screen will be displayed.
- Click on ***Add***.

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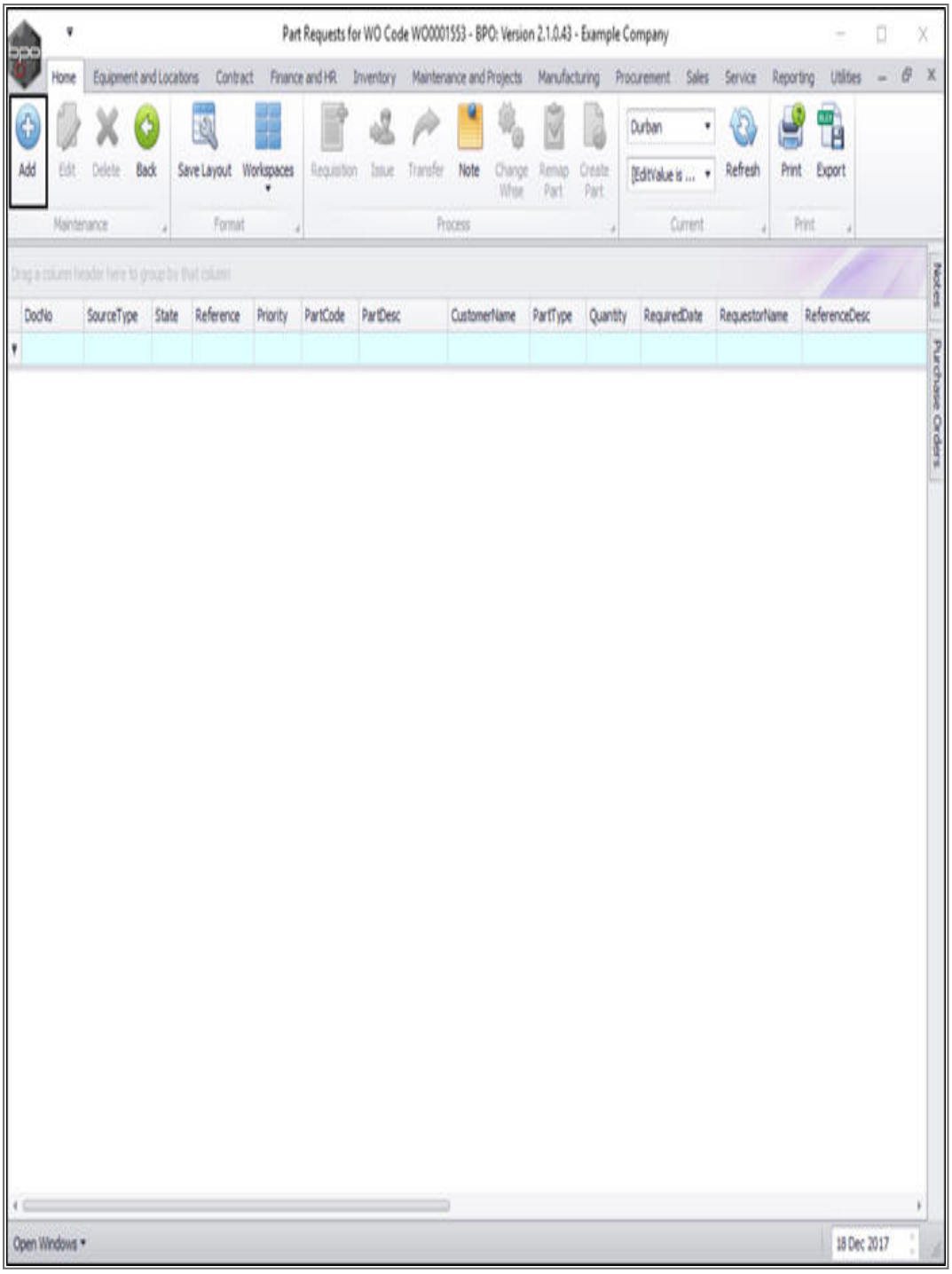

You have navigated to the same ***Part Requests*** screen.

There are 2 options:

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1. Select a BOM (Bill of Materials) Part Request
2. Select a single item Part Request

REQUEST FROM BOM

Request from BOM: With this selection; when you search for the part number, BPO will only bring up a list of parts that 'belong' to this machine. For this process, a Part List BOM must be set up. View Bill of Materials for more details.

- **BOM** or **Parts:** Click on the **BOM** radio button.
- **Work Order:** This will be auto populated with the work order number that you initially selected.
- **Part:** Click on the search button and select the part required from the list.
    - **Note:** See below Yield Controlled Parts for explanation regarding the message box that will pop up here.
- **Description:** This will auto populate as the part is selected.
- **Quantity:** Type in the quantity required.
- **Warehouse:** This will auto populate with the default site warehouse set up on the part Click on the search button and select an alternative warehouse, if required.
- **Required Date:** This will auto populate with the current date but you can click on the drop arrow and use the calendar function to select a different date if required.
- **Assigned To:** This will auto populate with the person currently creating the part request but you can click

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on the drop down arrow and select a different person if required.

- **Requested By:** This will auto populate with the person currently creating the part request but you can click on the drop down arrow and select a different person if required.
- **Comments:** Type in any comments as required.
- **Billable:** Click on this check box if the part is billable.
    - **Note:** This will be set to billable by default unless the part is linked to the contract as an inclusion.
    - Only stock items can be marked as billable, asset and loan requests will **not** be billable.
- **Under Warranty:** Click on the check box in order to note whether the item replaced is under warranty.
    - **Note:** This does not process the item as a warranty claim part. Refer to the Introduction in the Warranty Claims manual for more details.

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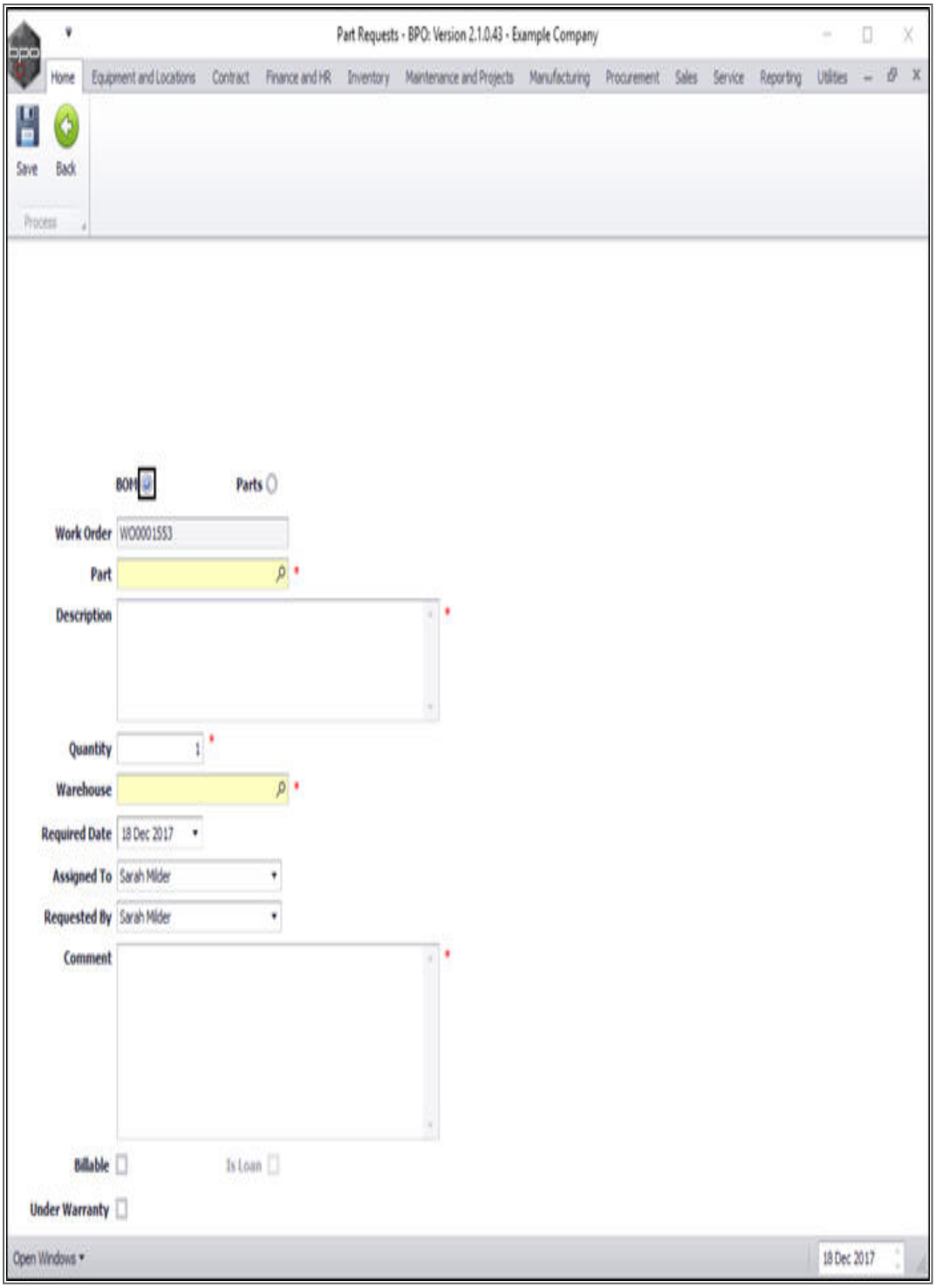

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REQUEST FROM PART LIST

Request from Parts: With this selection, when you search for the part number, BPO will bring up all part numbers entered onto the system.

- **BOM** or **Parts:** Click on the **Parts** radio button.
- **Work Order:** This will be auto populated with the work order that you initially selected.
- **Part:** Click on the search button and select the part required from the list.
    - **Note:** See below Yield Controlled Parts for explanation regarding the message box that will pop up here.
- **Description:** This will auto populate as the part is selected.
- **Quantity:** Type in the quantity required.
- **Warehouse:** Click on the search button and select the warehouse.
- **Required Date:** This will auto populate with the current date but you can click on the drop arrow and use the calendar function to select a different date if required.
- **Assigned To:** This will auto populate with the person currently creating the part request but you can click on the drop down arrow and select a different person if required.
- **Comments:** Type in any comments as required.
- **Billable:** Click on this check box if the part is billable.
    - **Note:** This will be set to billable by default unless the part is linked to the contract as

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an inclusion.

- Only stock items can be marked as billable, asset and loan requests will **not** be billable.

- **Under Warranty:** Click on the check box in order to note whether the item replaced is under warranty.
    - **Note:** This does not process the item as a warranty claim part. View Warranty Claims **Introduction** for more details.

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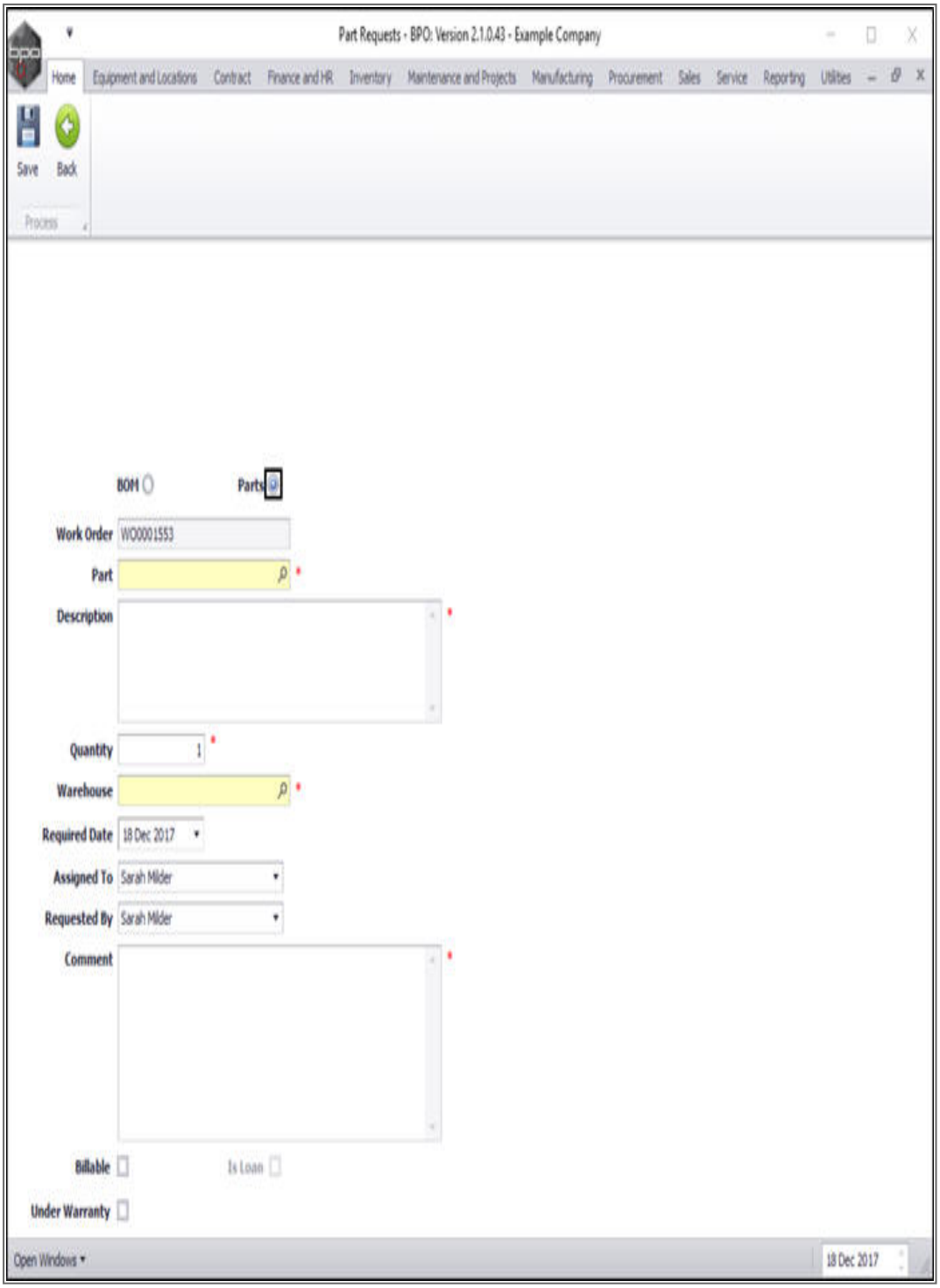

YIELD CONTROLLED PARTS

Note: For more information refer to Part Yield Config.

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- On selecting the part, a ***Yield Tracking*** message box will pop up giving you the ***Expected Yield*** and the ***Current Yield***.
- If the current yield is more than the expected yield, the system is not going to stop the part processing. You need to follow up on this accordingly.

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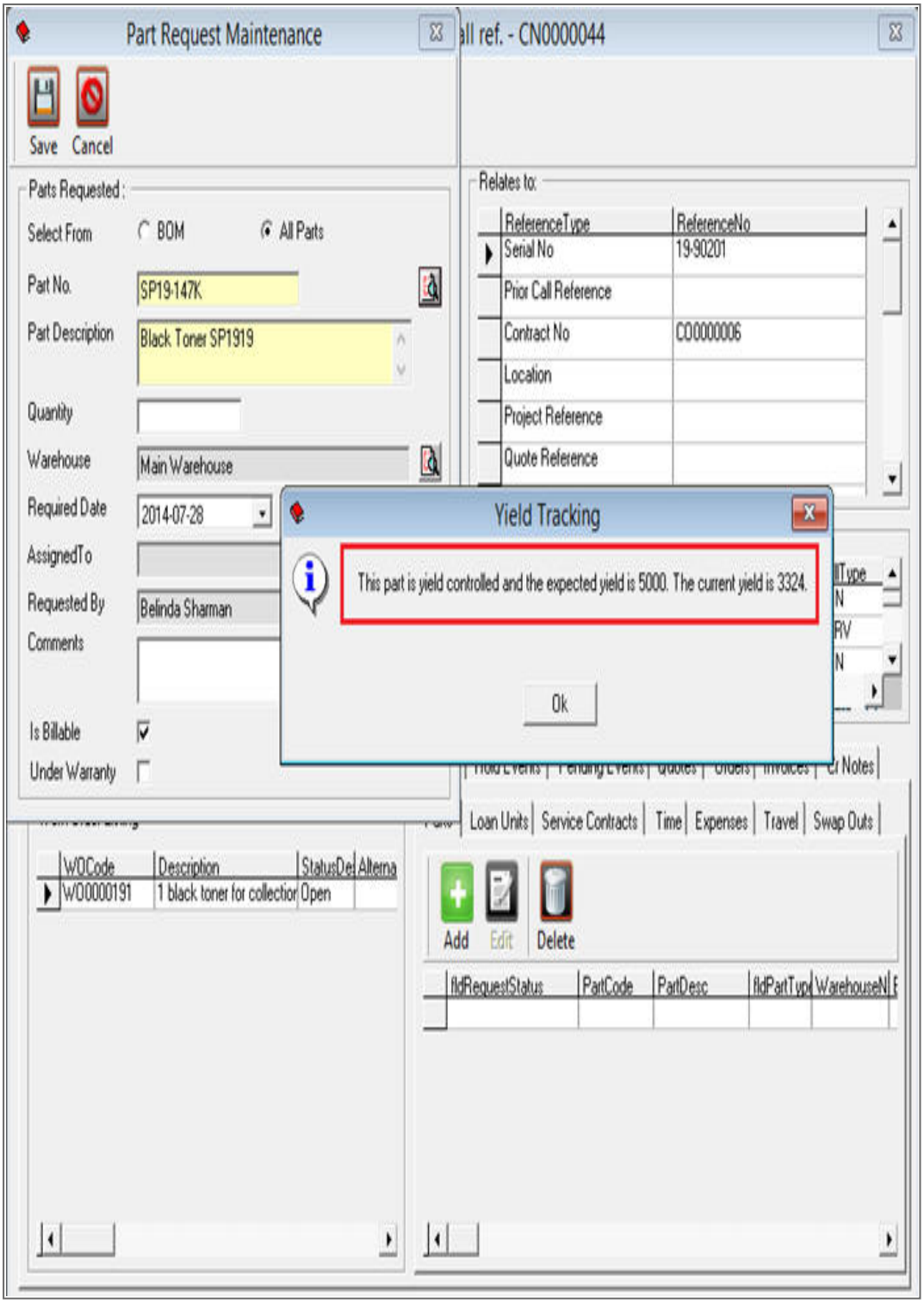

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- If a part has a yield configured, but no meter reading has been logged on the call, a ***Yield Tracking*** warning message will pop up informing you that;
    - ***Warning! This part is yield controlled but no meter reading has been captured on the call [ ].***
- Click on ***Ok***.
- Ensure the meter reading is added, ***save*** the call, then begin the ***part request*** process again.

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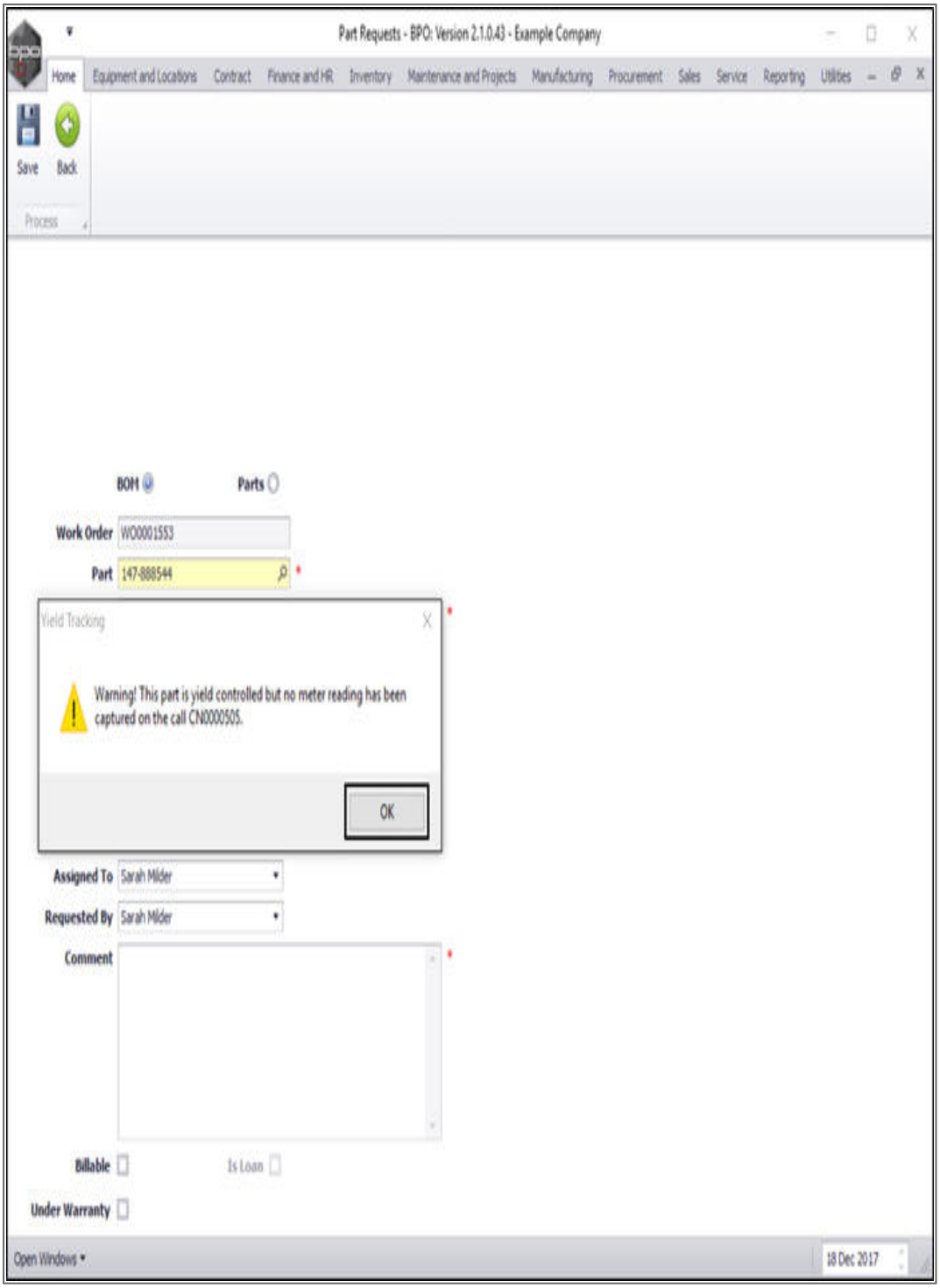

- When you have finished adding the details to the Part Requests screen, click on ***Save***.

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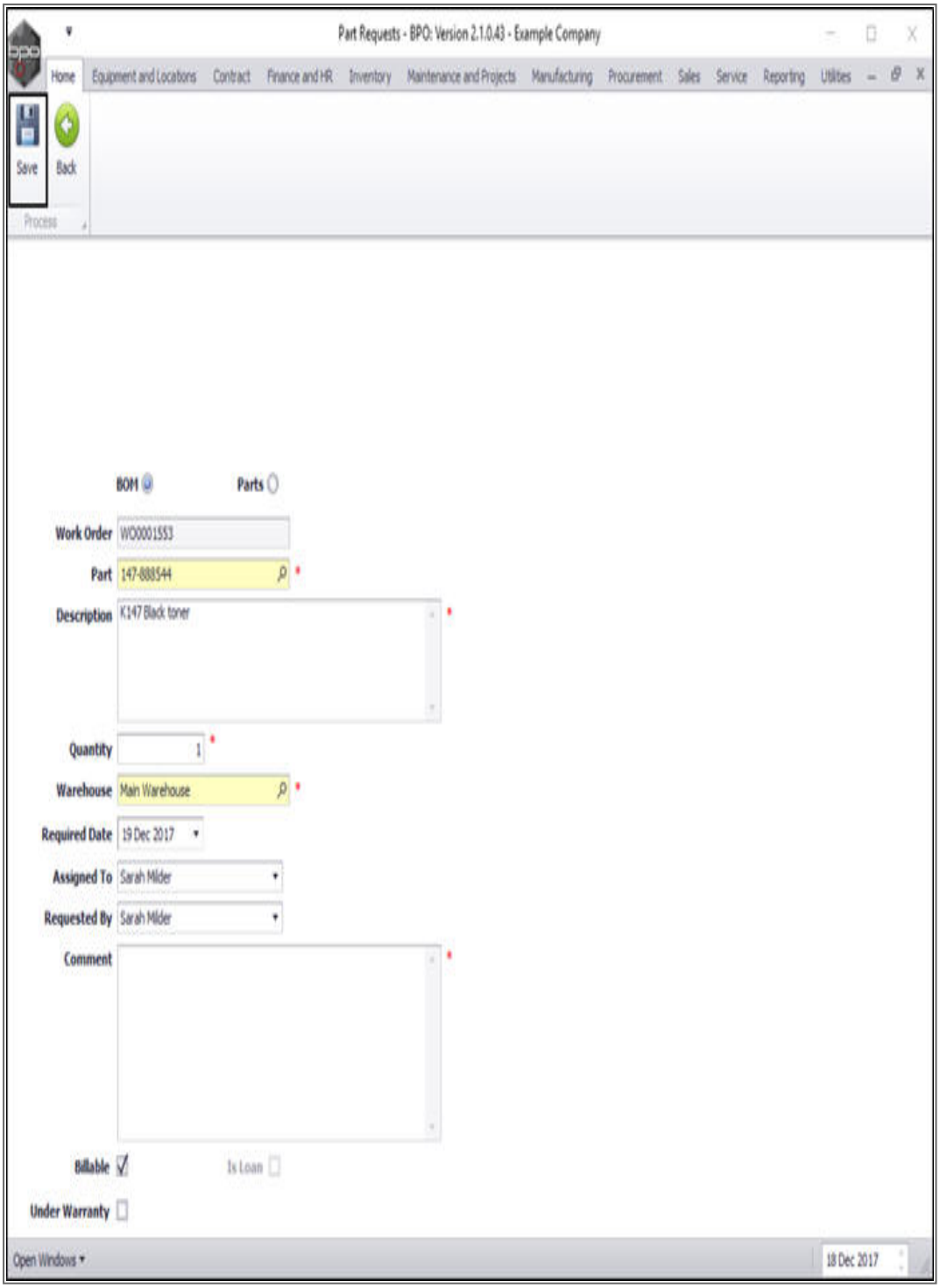

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- You will return to the ***Part Requests for WO Code [ ]*** screen.
- A ***Part Request Processing*** message box will pop up informing you that;
    - ***The Part Request for part [ ] has been added successfully to WO: [ ].***
- Click on ***OK***.

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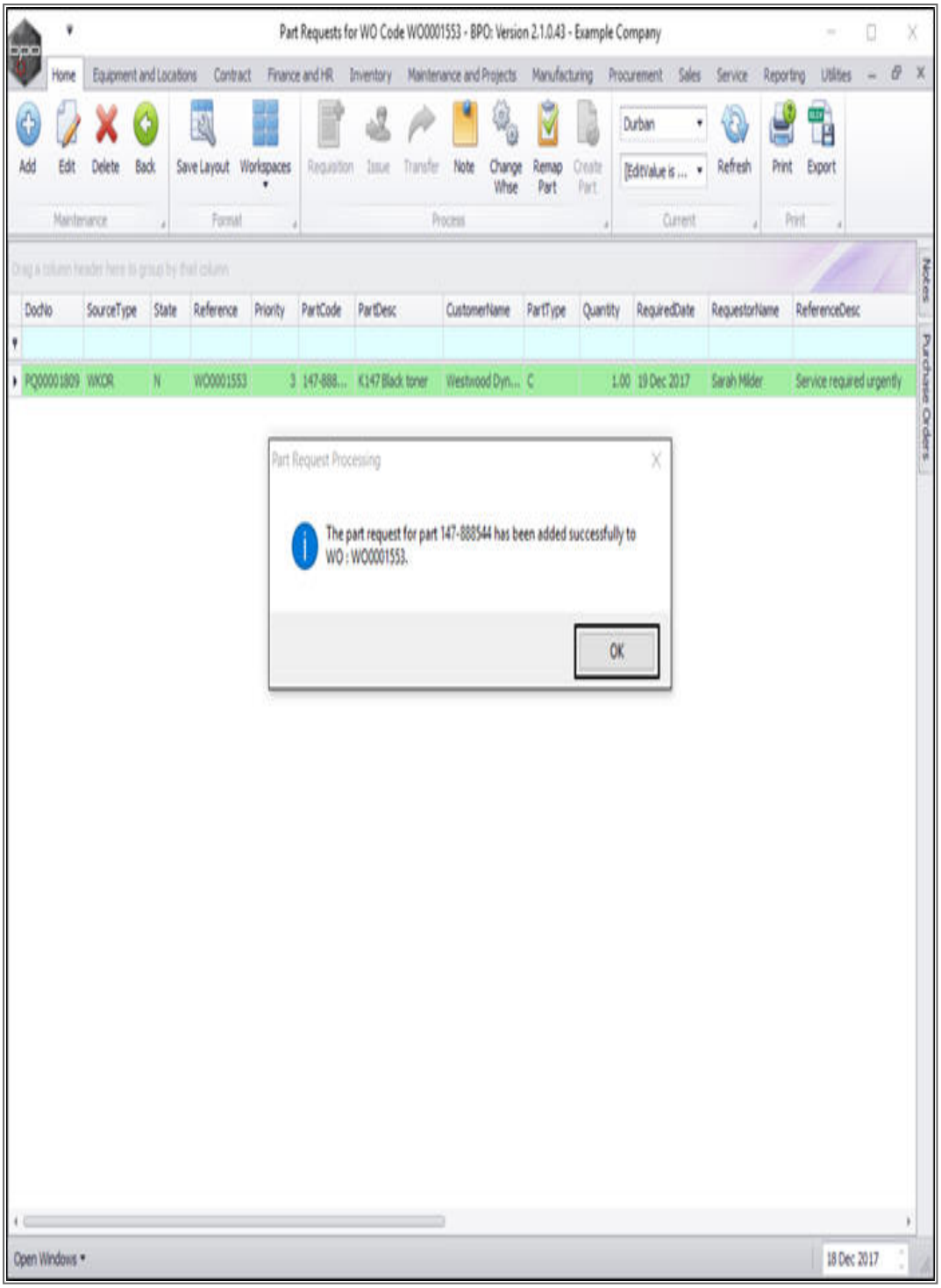

- You can now ***view*** the details of the ***part request*** in this screen.

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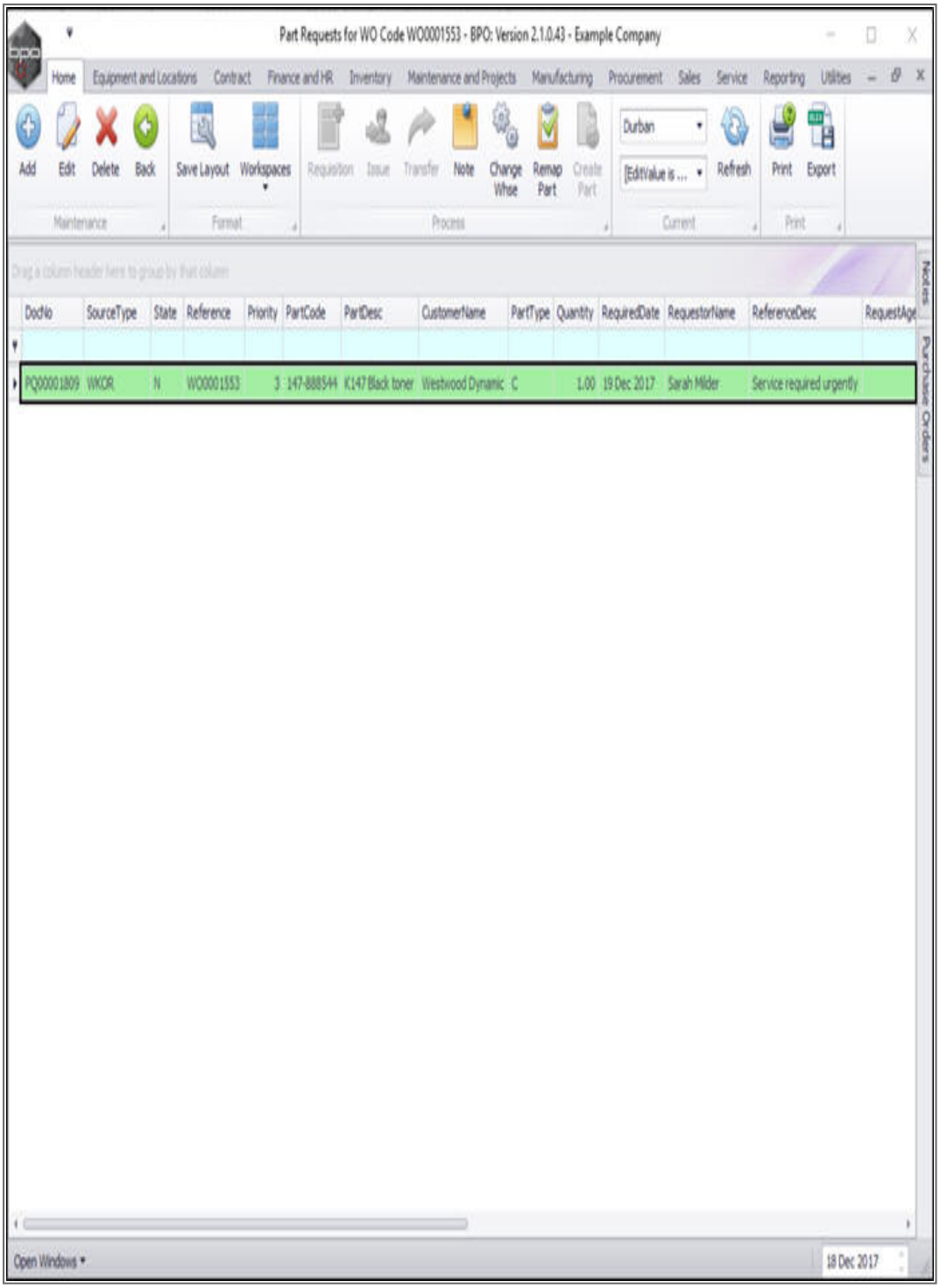

You can now follow the process to Issue the Part from the Call.

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