

SERVICE

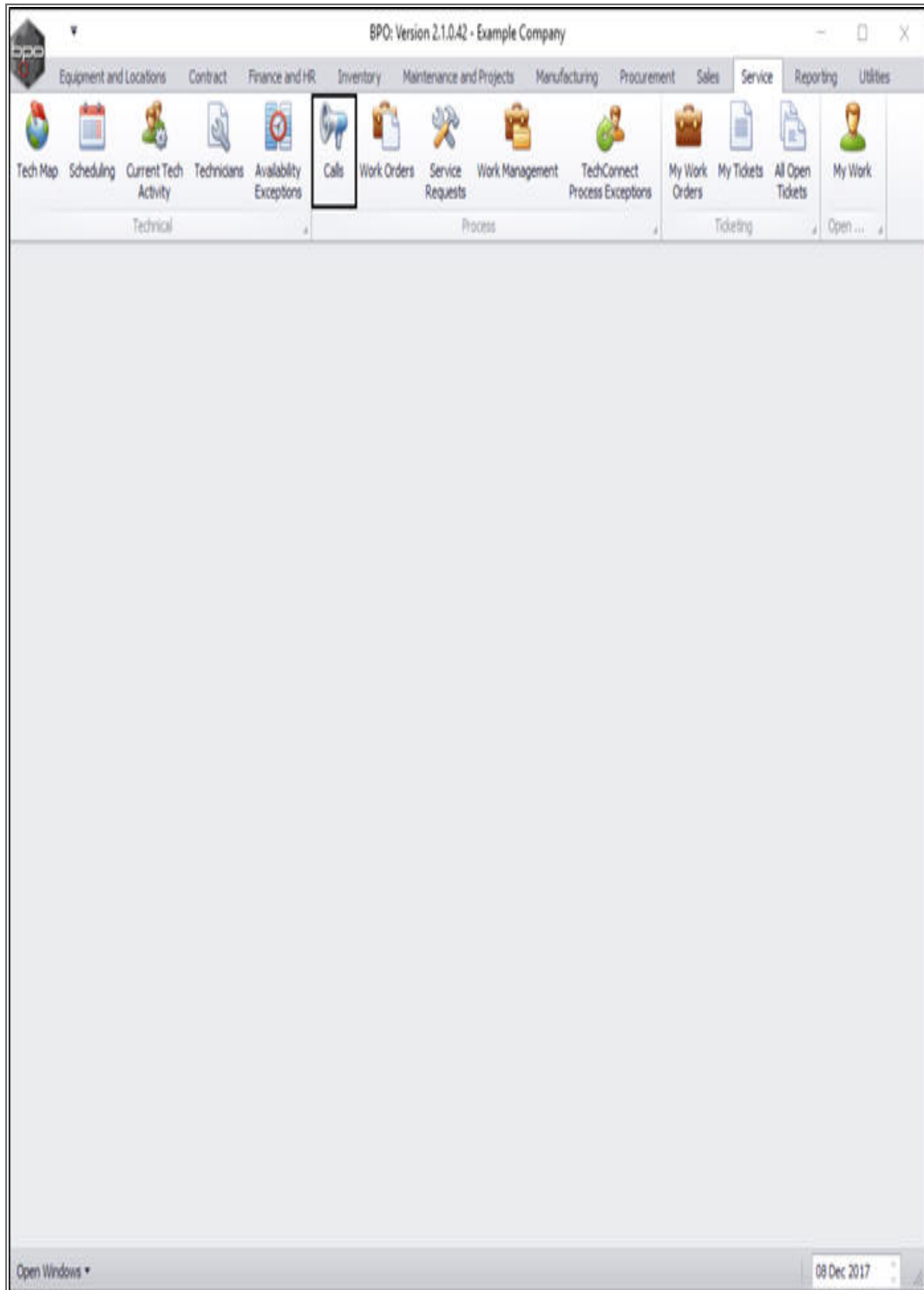
CALLS – REQUEST A PART FROM STORE

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*



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

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

The screenshot shows the 'Call Listing' application window. The interface includes a top menu bar with various functional areas like 'Home', 'Equipment and Locations', 'Contract', etc. Below the menu is a toolbar with icons for 'Add', 'Edit', 'Refresh', 'My Calls', 'Save Layout', 'Workspaces', 'Save Filter', 'My Call', 'Assign', 'Start', 'Close', 'Complete', 'Hold', 'Pending', 'Release', 'Print', and 'Reports'. A left-hand navigation pane shows a tree view for filtering by 'Information' and 'No Of Calls'. Under 'Information', 'Durban' is selected, and under 'Durban', 'New' is selected. The main area displays a table of call records.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo	ErrorCod
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...	FA
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765	PJ
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting A...	Jade Rivers	14-9652365	
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned			
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned			
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting A...	Ben John...		

SELECT THE CALL

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

The screenshot shows the 'Call Listing' application window. The title bar reads 'Call Listing - BPO: Version 2.1.0.43 - Example Company'. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar contains various icons for actions such as Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. Below the toolbar is a 'Find' and 'Filter' section. The main area displays a table of call records with columns: CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and SerialNo. A sidebar on the left shows a hierarchical filter for 'Information' and 'No Of Calls' by location (Durban, Pretoria) and status (New, In Progress, Hold, Pending, Complete, All).

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW0011111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	

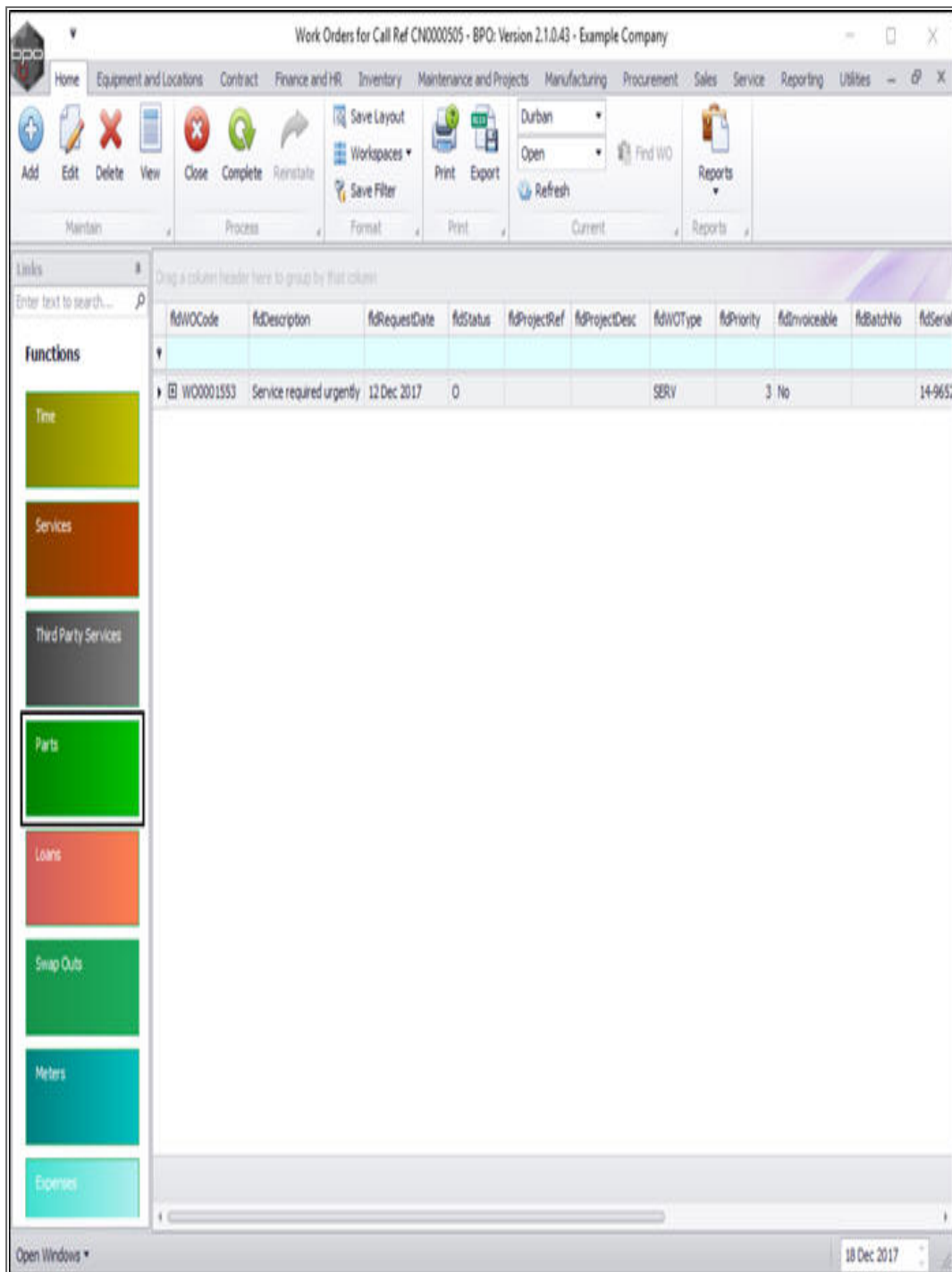
- The **Call Maintenance: Call ref. - []** screen will be displayed.

SELECT THE WORK ORDER (METHOD 1)

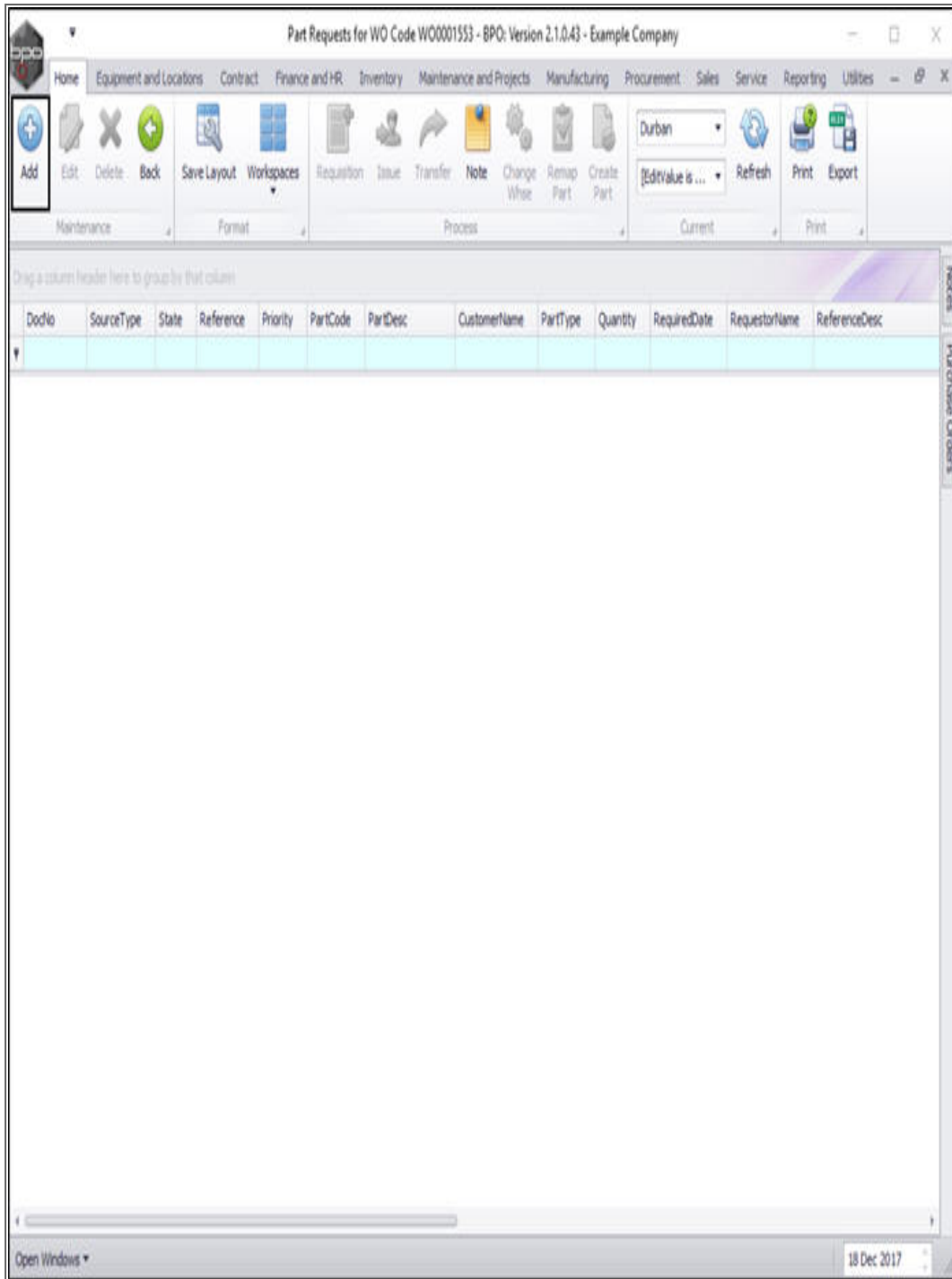
- Click on the **Work Orders** tile.

The screenshot displays the 'Call maintenance' window for a call reference 'CN0000505'. The interface includes a top menu bar with various system functions, a toolbar with icons for save, back, close, complete, assign, hold, pending, release, reinstate, save layout, workspaces, print, and note. On the left, a 'Functions' sidebar contains several colored tiles: 'Work Orders' (highlighted in yellow), 'Work In Progress' (green), 'Notes' (brown), 'Assignments' (grey), 'Hold History' (teal), 'Pending History' (light blue), 'On Site Info' (red), and 'Fix Contract' (orange). The main area shows call details for 'Westwood Dynamic' with fields for Contact (Jason March), Address (965 Barlet Str West Dunes), Call Type (Service), Description (Service required urgently), Call Date Time (12 Dec 2017 11:18:00), Priority (3), Date Required (15 Dec 2017), and Status (N - New). A 'Relates To' table on the right lists various reference types and their values, such as Serial No 14-9652365 and Contract No CO0000011. A 'Closure Details' section at the bottom right includes fields for Action, Closure Date Time (00:00:00), and Closed By.

- 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.



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



SELECT THE WORK ORDER (METHOD 2)

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

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

The screenshot shows the 'Call Listing' application window. The title bar reads 'Call Listing - BPO: Version 2.1.0.43 - Example Company'. The interface includes a top navigation bar with tabs 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 various icons for actions like 'Add', 'Edit', 'Refresh', 'My Calls', 'Save Layout', 'Workspaces', 'Save Filter', 'My Call', 'Assign', 'Start', 'Close', 'Complete', 'Hold', 'Pending', 'Release', 'Print', and 'Reports'. A sidebar on the left contains a 'Find' and 'Filter' section, and a tree view for 'Information' with 'No Of Calls' for various locations and statuses. The main area displays a table of call records.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	

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

The screenshot shows the 'Call Listing - BPO: Version 2.1.0.43 - Example Company' window. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar contains various icons for actions such as Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. A left-hand navigation pane shows a tree view for 'Information' with categories like Durban (11), New (6), In Progress (1), Hold (2), Pending (0), Complete (1), All (11), Pretoria (0), and sub-categories like New, In Progress, Hold, Pending, Complete, and All for each location.

The main data grid displays call records with columns: CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and SerialNo. The following table represents the data shown in the grid:

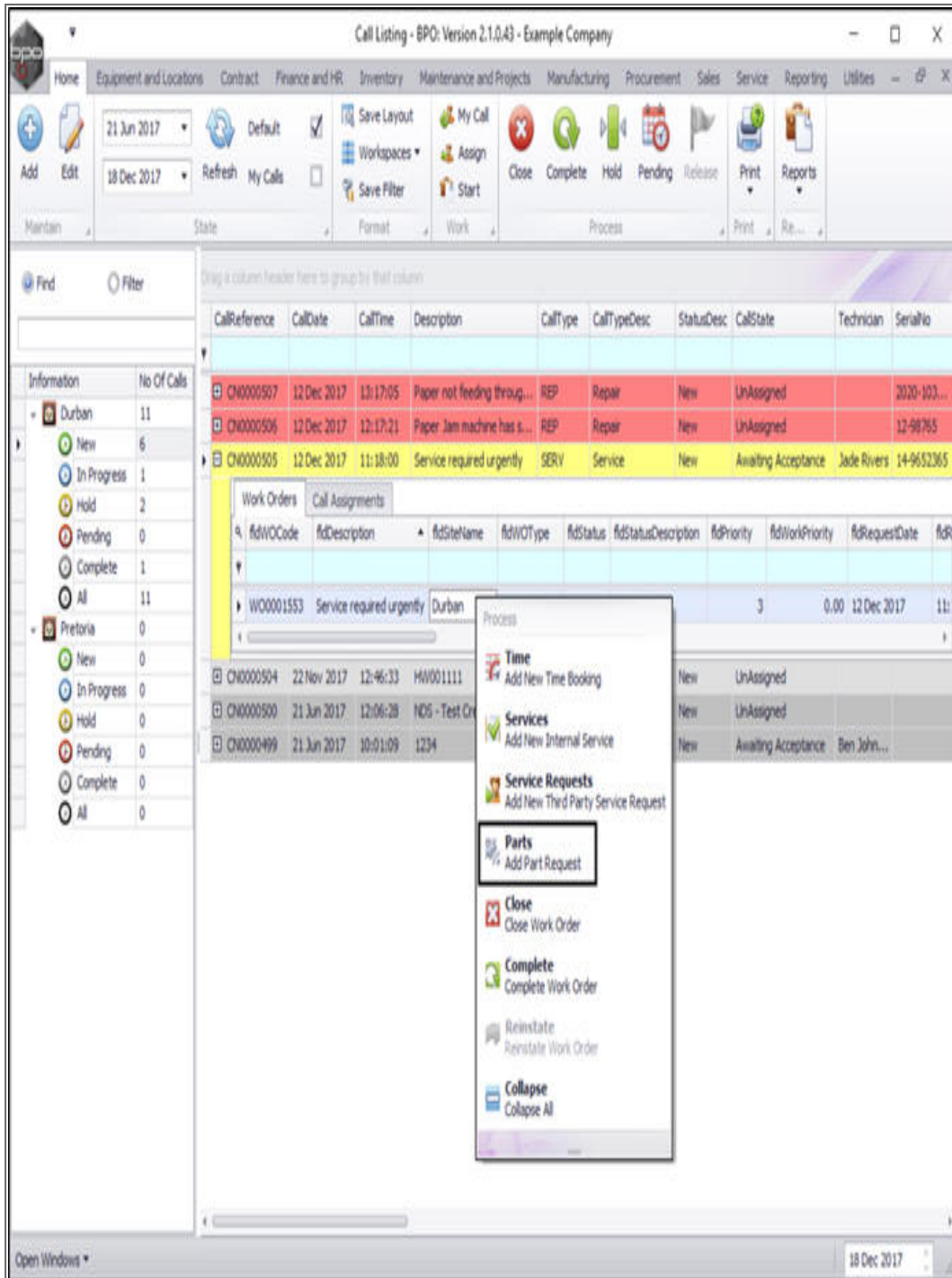
CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throu...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	ND5 - Test Credit and ret...	ND5	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	ND5	New Deal Sale	New	Awaiting Acceptance	Ben John...	

The 'Work Orders' grid is expanded, showing columns: fdWOCCode, fdDescription, fdSiteName, fdWOType, fdStatus, fdStatusDescription, fdPriority, fdWorkPriority, fdRequestDate, and fdR... The data in this grid is as follows:

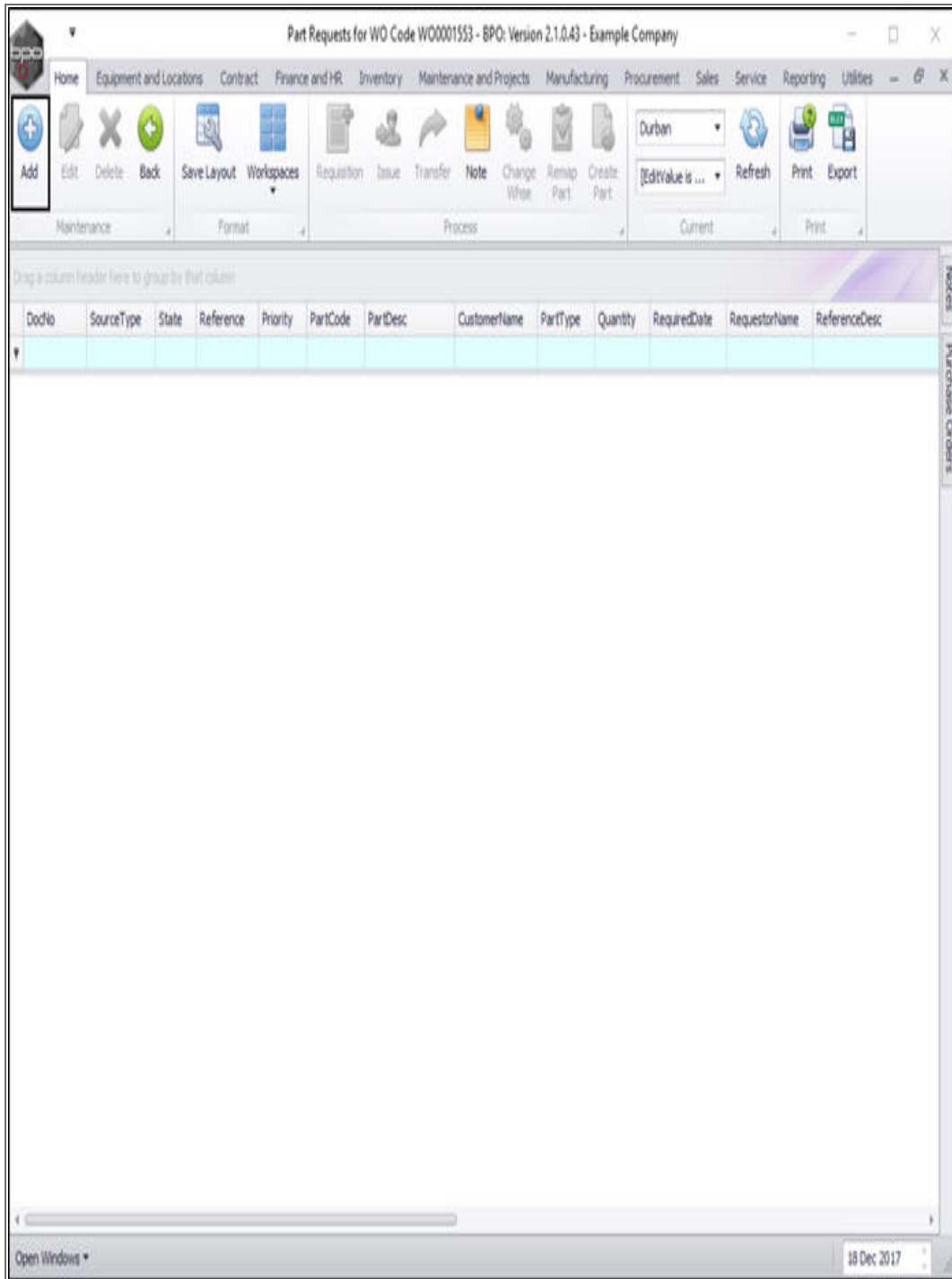
fdWOCCode	fdDescription	fdSiteName	fdWOType	fdStatus	fdStatusDescription	fdPriority	fdWorkPriority	fdRequestDate	fdR...
WO0001553	Service required urgently	Durban	SERV	0	Open	3	0.00	12 Dec 2017	11:

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.



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



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

There are 2 options:

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

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.

Part Requests - BPO: Version 2.1.0.43 - Example Company

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

Save | Back | Process

BOM Parts

Work Order: W00001553

Part:

Description:

Quantity:

Warehouse:

Required Date: 18 Dec 2017

Assigned To: Sarah Milder

Requested By: Sarah Milder

Comment:

Billable Is Loan

Under Warranty

Open Windows | 18 Dec 2017

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

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.

The screenshot shows a software window titled "Part Requests - BPO: Version 2.1.0.43 - Example Company". The interface includes a top navigation bar with menu items: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with "Save" and "Back" buttons, and a "Process" dropdown menu. The main form area contains the following fields and controls:

- BOM** and **Parts** tabs.
- Work Order**: Text input field containing "W0001553".
- Part**: Text input field with a dropdown arrow and a red asterisk.
- Description**: Large text area with a red asterisk.
- Quantity**: Text input field containing "1" and a red asterisk.
- Warehouse**: Text input field with a dropdown arrow and a red asterisk.
- Required Date**: Date picker showing "18 Dec 2017".
- Assigned To**: Dropdown menu showing "Sarah Milder".
- Requested By**: Dropdown menu showing "Sarah Milder".
- Comment**: Large text area with a red asterisk.
- Billable**: Checkbox.
- Is Loan**: Checkbox.
- Under Warranty**: Checkbox.

At the bottom of the window, there is an "Open Windows" dropdown and a system clock showing "18 Dec 2017".

YIELD CONTROLLED PARTS

Note: For more information refer to [Part Yield Config.](#)

- 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.

Part Request Maintenance

Save Cancel

Parts Requested:

Select From BOM All Parts

Part No.

Part Description

Quantity

Warehouse

Required Date

Assigned To

Requested By

Comments

Is Billable

Under Warranty

all ref. - CN0000044

Relates to:

ReferenceType	ReferenceNo
Serial No	19-90201
Prior Call Reference	
Contract No	CO0000006
Location	
Project Reference	
Quote Reference	

Yield Tracking

This part is yield controlled and the expected yield is 5000. The current yield is 3324.

Ok

WOCCode	Description	StatusDel	Alterna
W00000191	1 black toner for collector	Open	

+ Add
📄 Edit
🗑 Delete

fldRequestStatus	PartCode	PartDesc	fldPartType	Warehouse	NLF

- 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.

Part Requests - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

BOM Parts

Work Order W00001553

Part 147-888544

Yield Tracking

Warning! This part is yield controlled but no meter reading has been captured on the call CN0000505.

OK

Assigned To Sarah Milder

Requested By Sarah Milder

Comment

Billable Is Loan

Under Warranty

Open Windows 18 Dec 2017

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

Part Requests - BPO: Version 2.1.0.43 - Example Company

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

Save | Back

Process

BOM | Parts

Work Order: W00001553

Part: 147-888544

Description: K147 Black toner

Quantity: 1

Warehouse: Main Warehouse

Required Date: 19 Dec 2017

Assigned To: Sarah Milder

Requested By: Sarah Milder

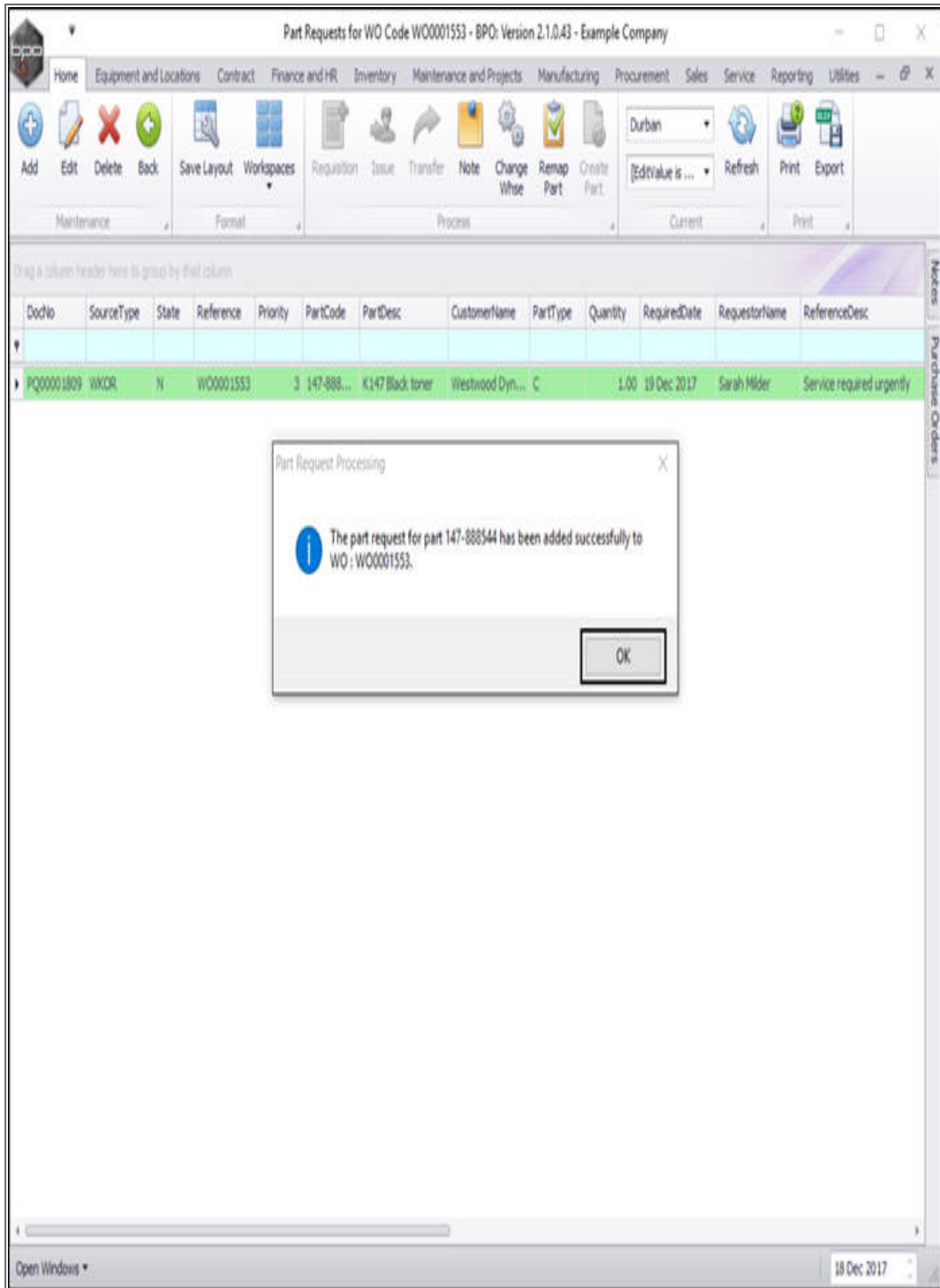
Comment:

Billable | Is Loan

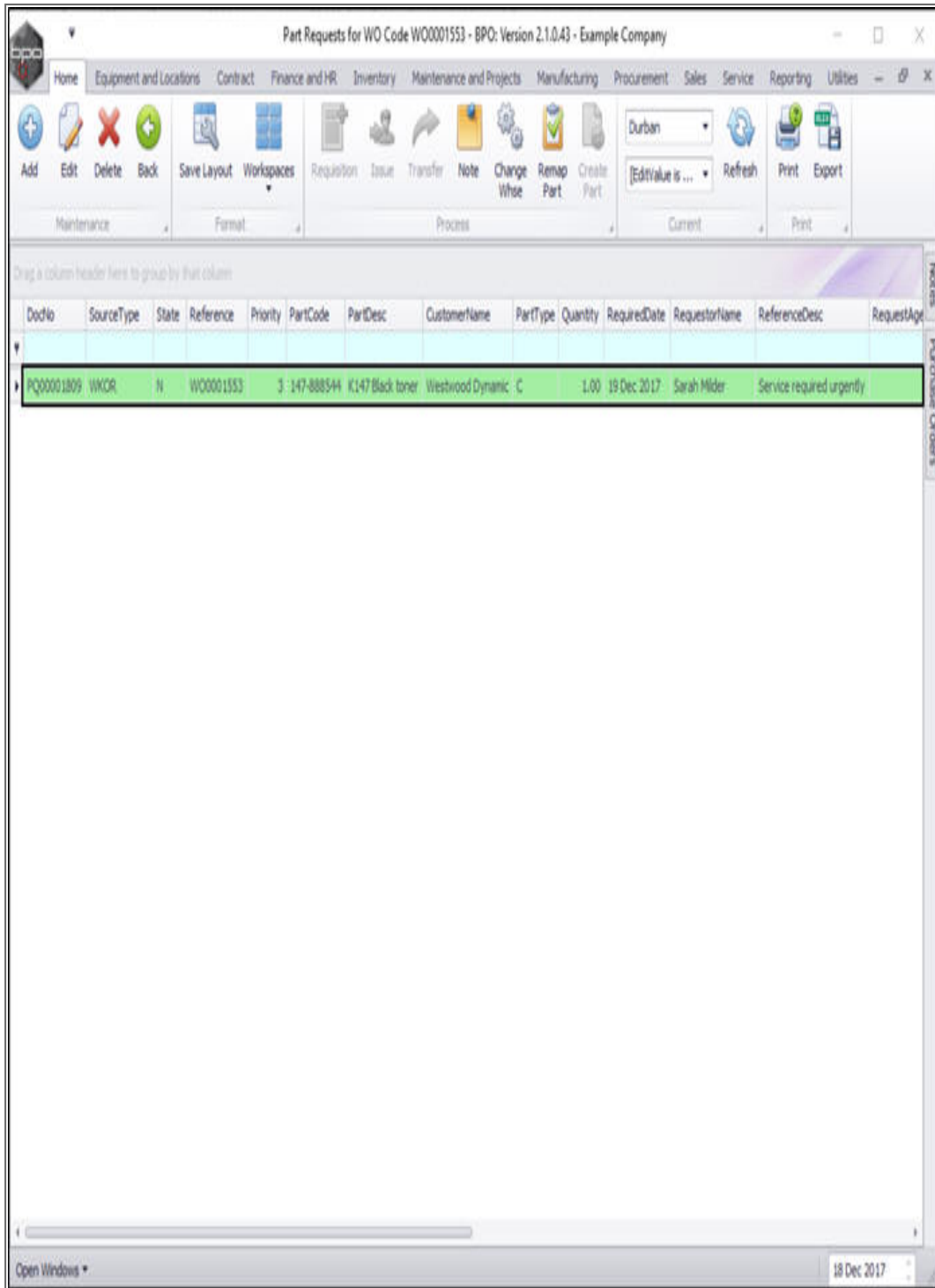
Under Warranty

Open Windows | 18 Dec 2017

- 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***.



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



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

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