

SERVICE

CALLS - REQUEST THIRD PARTY SERVICE

You will need to raise a Service Request when, for example, a Supplier is providing a service for this call or a Dealer is performing this service on your behalf.

From the Service Request, you can start a <u>Non-Stock Procurement</u> cycle, i.e. Raise a Purchase Order to the Supplier/Dealer, Non-Stock Goods Received Note and Supplier Invoice.

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

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*.

h *					Call Listing	- BPO: Version 2.1.0.43 - Ex	Imple Com	spany			*	D X
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+ 🖸 Durban		48	CN0000506	12 Dec 2017	12:17:21	Paper Jam machine has s	REP	Repar	New	UnAssigned		12-98765
O New	1	25	E CN0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-96523
O IN Pr	ogress	6	E CN0000504	22 Nov 2017	12:46:33	HW001111	NOR	New Deal Rental	New	UnAssigned		
O Peru	dan.	3	E CN0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret	NDS	New Deal Sale	New	UnAssigned		
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Q AI		48	E CN0000498	20 Jun 2017	12:08:13	Test call for swap out - in	FR.	Parts Requirem	New	UnAssigned		2020-10
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O New		0	E CN0000496	19 Jun 2017	12:14:44	TT002 · Weekly - Call per	SM	Scheduled Main	New	Awaiting Acceptance	Beinda S	
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O Com	plete	0	CN0000488	06 Jun 2017	10:20:09	Test creating a cal with t	INST	Installation	New	UnAssigned		
0 4		0	E CN0000486	01 Jun 2017	15:06:59	Call - Orders	NOR	New Deal Rental	New	UnAssigned		
			E (1000048)	31 May 2017	16:18:35	Bidans Quick Part Return	0R	Select Call Type	New	UnAssigned		20-8529
			E CN0000481	31 May 2017	15:11:20	Quick Part Return v20.7	PR	Parts Requirem	New	UnAssigned		20-8525
			E CN0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D	
			E CN0000479	26 May 2017	15:03:59	Test saving a call linked t	R	Parts Requirem	New	UnAssigned		14-9652
			E CN0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F	FR	Parts Requirem	New	UnAssigned		2020-43
			CN0000475	25 May 2017	09:16:05	Swap out - asset on a sh	DR.	Select Call Type	New	UnAssigned		test567
			E CN0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-302
			E CN0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	π	IT Requirement	New	UnAssigned		1020-10
			E CN0000472	24 May 2017	14:38:10	Contract Service Test v2	SERV	Service	New	UnAssigned		2020-43
			E CN0000467	24 May 2017	09:29:20	Call - Loan Unt Request	REP	Reper	New	UnAssigned		20-852
		1	H CN0000464	23 May 2017	08:54:25	Loan Unit Return v2.1	REP	Repair	New	UnAssigned		20-8529
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- Click on the *row selector* in front of the *call* you wish to raise a *service request* for.
- You can either click on *Edit*.

	٠				Call Listing	- BPO: Version 2.1.0.43 - Ex	ample Com	npany			*	D X
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			0,000483	31 May 2017	16:18:35	Bdass Quick Part Return	DR.	Select Call Type	New	UnAssigned		20-852963
			E 010000481	31 May 2017	15:11:20	Quick Part Return v20.7	PR	Parts Requirem	New	UnAssigned		20-852963
			E CN0000460	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D	
			E CN0000479	26 May 2017	15:03:59	Test saving a call linked t	PR	Parts Requirem	New	UnAssigned		14-965236
			E CN0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F	FR	Parts Requirem	New	UnAssigned		2020-4325
			CN0000475	25 May 2017	09:16:05	Swap out - asset on a sh	DR.	Select Call Type	New	UnAssigned		test987654
			E CN0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30200
			E CN0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	π	IT Requirement	New	UnAssigned		1020-1010
			E CN0000472	24 May 2017	14:38:10	Contract Service Test v2	SERV	Service	New	UnAssigned		2020-4325
			E CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request	REP	Repar	New	UnAssigned		20-852963
			E 010000464	23 May 2017	08:54:25	Loan Unit Return v2.1	REP	Repair	New	UnAssigned		20-852963
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The *Call maintenance: Call ref. - []* screen will be displayed.

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• Click on the *Work Orders* tile.



The *Work Orders for Call Ref []* screen will be displayed.

- Work Orders for Call Ref CN0000464 BPO: Version 2.1.0.43 Example Company ų X Equipment and Locations Contract: Finance and HR: Inventory: Maintenance and Projects: Manufacturing: Procurement: Sales: Service: Reporting: Utilities: 🗕 🗗 🗙 Home Save Layout Durban ٠ 1 LB 5 • Prod WO Workspaces * Öpen Print Export Add Edt Delete Vev Close Complete Renatate Reports 🕒 Refresh Save Filter Maintain Process Format Print Reports **Current** Links 4 Enter text to search.. ø **fdWOCode** fidRequestDate fidStatus fidProjectRef fidProjectDesc fidWOType fidPriority fidInvoiceable fidSatchNo **fdDescription** Functions ۲ W00001360 Loan Unit Return v2.1.0.5 23 May 2017 0 REP 2 No Services Third Party Services Parts Swap Outs Meters 18 Dec 2017 Open Windows *
- Click on *Third Party Services*.



- or you can click on the *Expand* button on the *call* you wish to log a *ser-vice request* for and select the relevant *work order*.
- 2. *Right click* anywhere in the row of the *work order* where you wish to log a *service request* for and
- select *Service Requests* Add New Third Party Service Request from the *Process* pop up menu displayed.

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

• Click on Add.



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The *Third Party Services* screen will be displayed.



- Work Order: This will auto populate with the work order number initially selected.
- Service: Click on the search icon and select the service required.
- **Description:** The description will populate as you select the above service. Type in 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 but can be changed by typing in the correct quantity.
- **Price:** The price will auto populate with what's set up on the system but can be changed by typing in the correct price.
- Assigned To: This will auto populate with the person currently creating the service request but you can click on the search icon and select an alternative person if required.
- **Required Date:** This will auto populate with the current date but you can click on the drop down arrow and use the calendar function to select a different date if required.
- Billable: Select this option if the service is billable.
 - **Note:** This will be set to billable by default, unless the service is linked to the contract as an inclusion.
- **Comment:** Type in any additional comments here if required.



·			Thi	ird Party Serv	ices - BPO: Version 2.1.0.43	Example Comp	any				1	0	
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Required Date	19 Dec 2017 •												
Billable													
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• When you have finished adding the details to the Third Party Services screen, click on *Save*.



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- 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 *service request details* in this screen.



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