

SERVICE

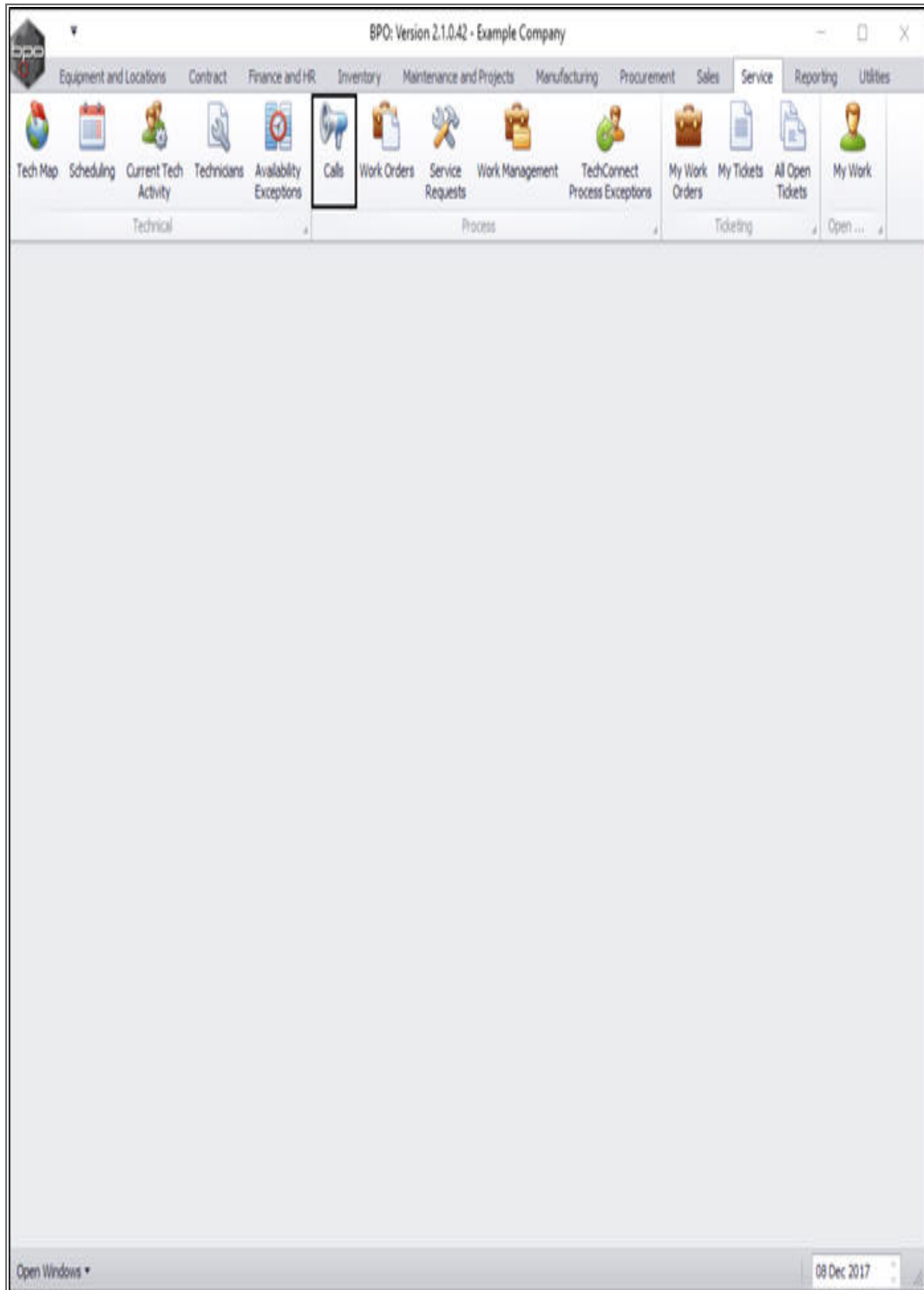
CALLS – REQUEST THIRD PARTY SERVICE

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 [Non-Stock Procurement](#) 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**.

The screenshot shows the 'Call Listing' application interface. The main window title is 'Call Listing - BPO: Version 2.1.0.43 - Example Company'. The interface includes a top navigation bar with various menu items like 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 icons for Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area is divided into a left sidebar and a central table.

The left sidebar contains a 'Find' and 'Filter' section. Under 'Filter', there are two main categories: 'Information' and 'Location'. Under 'Information', the 'New' status is selected, showing 25 calls. Under 'Location', 'Durban' is selected, showing 48 calls. The 'Information' section also lists other statuses: In Progress (6), Hold (3), Pending (1), Complete (10), and All (48). The 'Location' section lists other locations: Pretoria (0), In Progress (0), Hold (0), Pending (0), Complete (0), and All (0).

The central table displays a list of calls with the following columns: CallRefere..., CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and SerialNo. The table contains 25 rows of call data, with the first row highlighted in red. The first row is: CN0000507, 12 Dec 2017, 13:17:05, Paper not feeding thro..., REP, Repair, New, UnAssigned, 2020-103...

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CN0000507	12 Dec 2017	13:17:05	Paper not feeding thro...	REP	Repair	New	UnAssigned		2020-103...
CN0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CN0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CN0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CN0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CN0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CN0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Require...	New	UnAssigned		2020-102...
CN0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652365
CN0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CN0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	sin123
CN0000493	15 Jun 2017	12:28:25	Test OrNote Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CN0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CN0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	UnAssigned		
CN0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CN0000483	31 May 2017	16:18:35	Bdass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-852963
CN0000481	31 May 2017	15:11:20	Quick Part Return v2..0.7	PR	Parts Require...	New	UnAssigned		20-852963
CN0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CN0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Require...	New	UnAssigned		14-9652365
CN0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Require...	New	UnAssigned		2020-43257
CN0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		test987654
CN0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30200
CN0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10102
CN0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43256
CN0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-852963
CN0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-852963

- Click on the **row selector** in front of the **call** you wish to raise a **service request** for.
- You can either click on **Edit**.

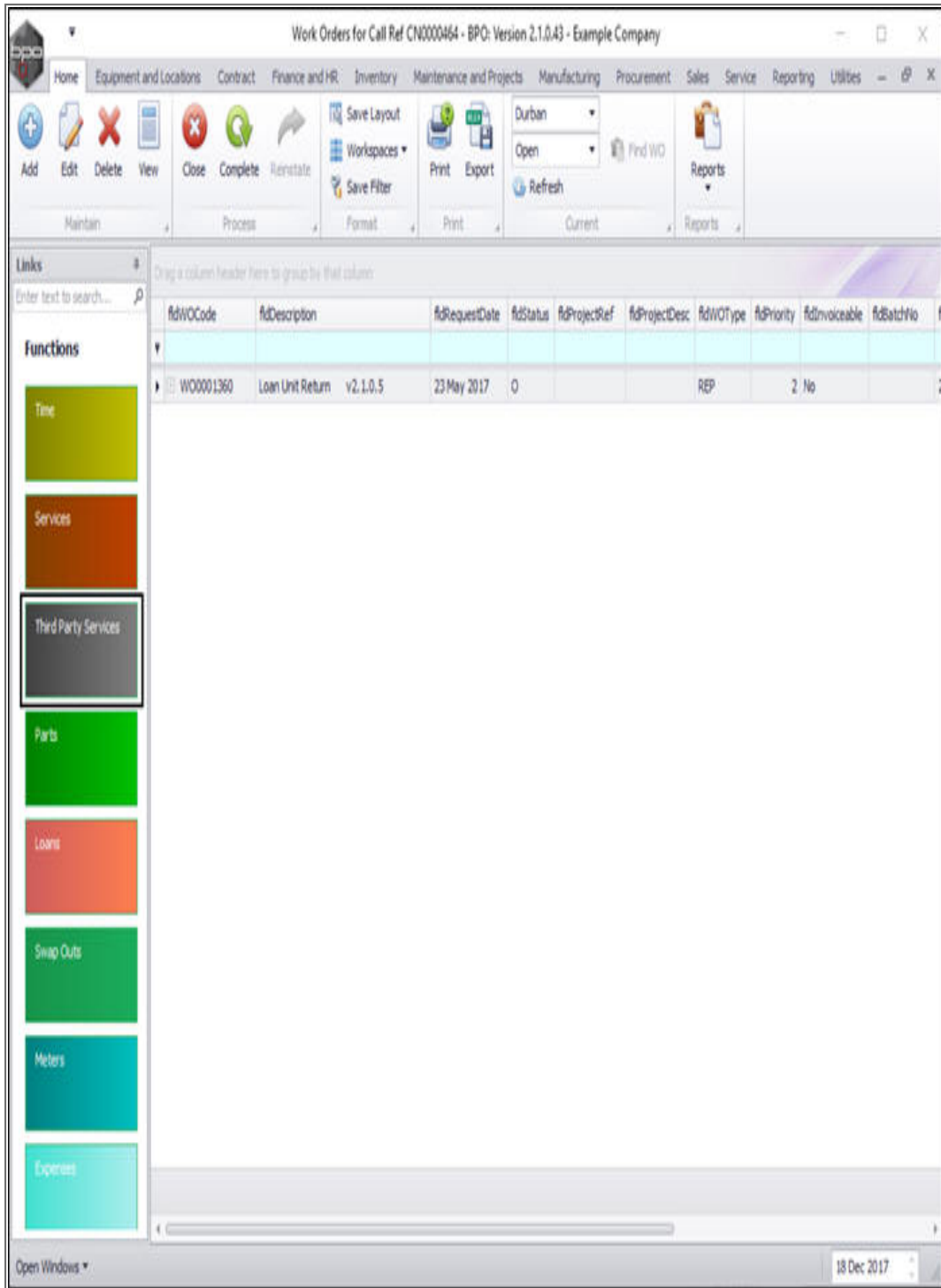
CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding thro...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	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...	NDG	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDG	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-102...
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652365
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	sin123
CH0000493	15 Jun 2017	12:28:25	Test OrNote Totals for Pri...	NDG	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDG	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bdass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-852963
CH0000481	31 May 2017	15:11:20	Quick Part Return v2..0.7	PR	Parts Requirem...	New	UnAssigned		20-852963
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652365
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43257
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		test987654
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30200
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10102
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43256
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request...	REP	Repair	New	UnAssigned		20-852963
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-852963

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

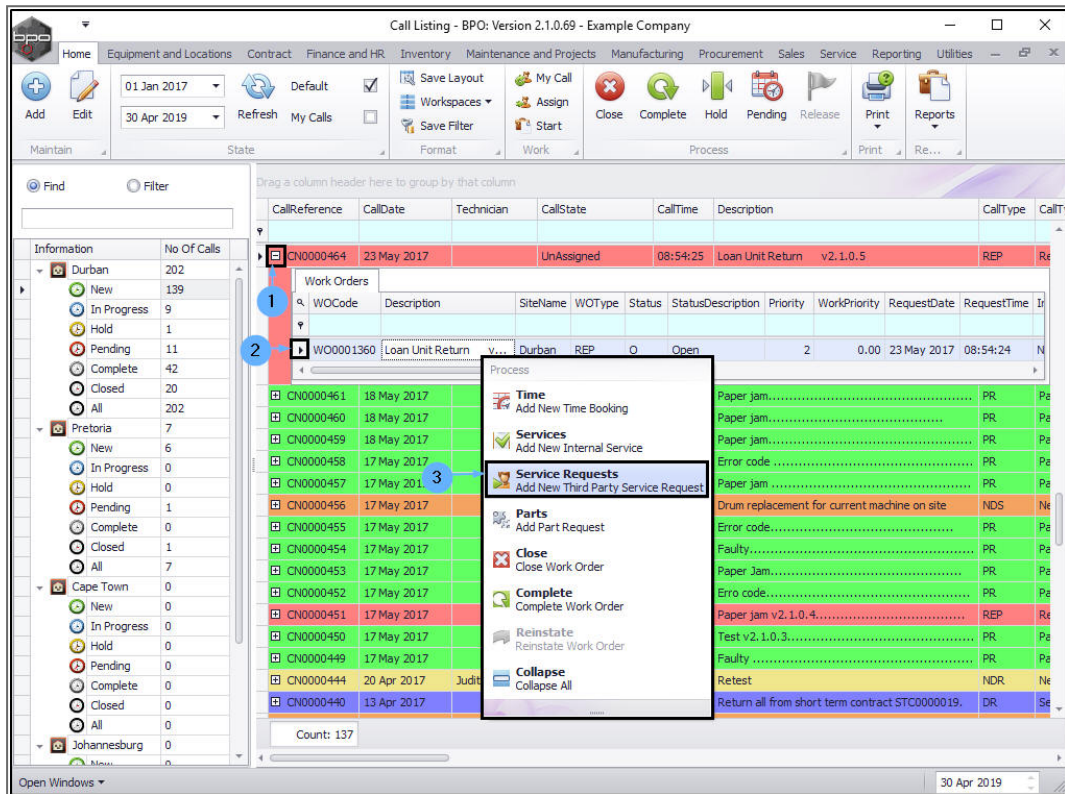
- Click on the **Work Orders** tile.

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

- Click on **Third Party Services**.

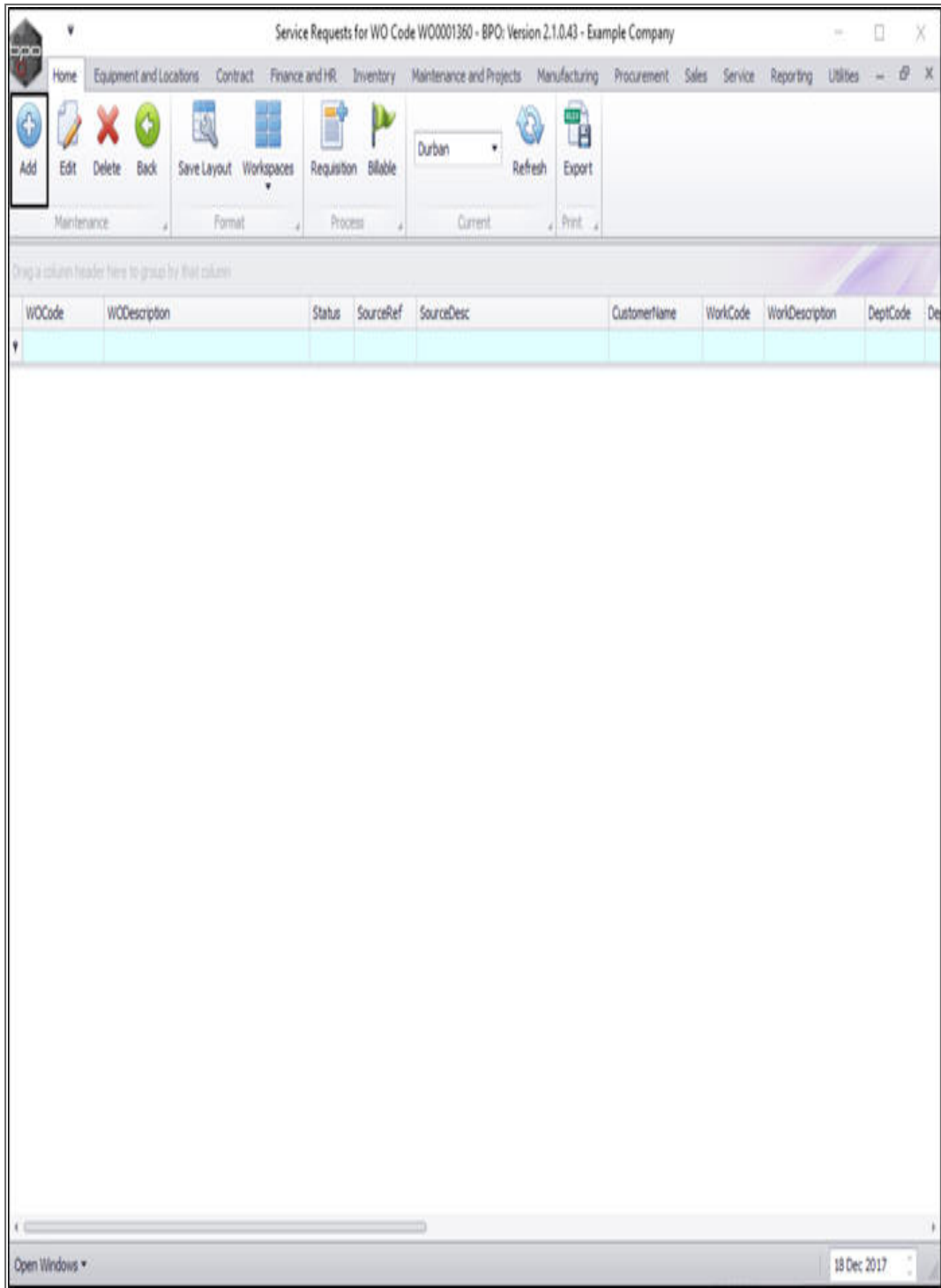


1. or you can click on the **Expand** button on the **call** you wish to log a **service request** for and select the relevant **work order**.
2. **Right click** anywhere in the row of the **work order** where you wish to log a **service request** for and
3. select **Service Requests - Add New Third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



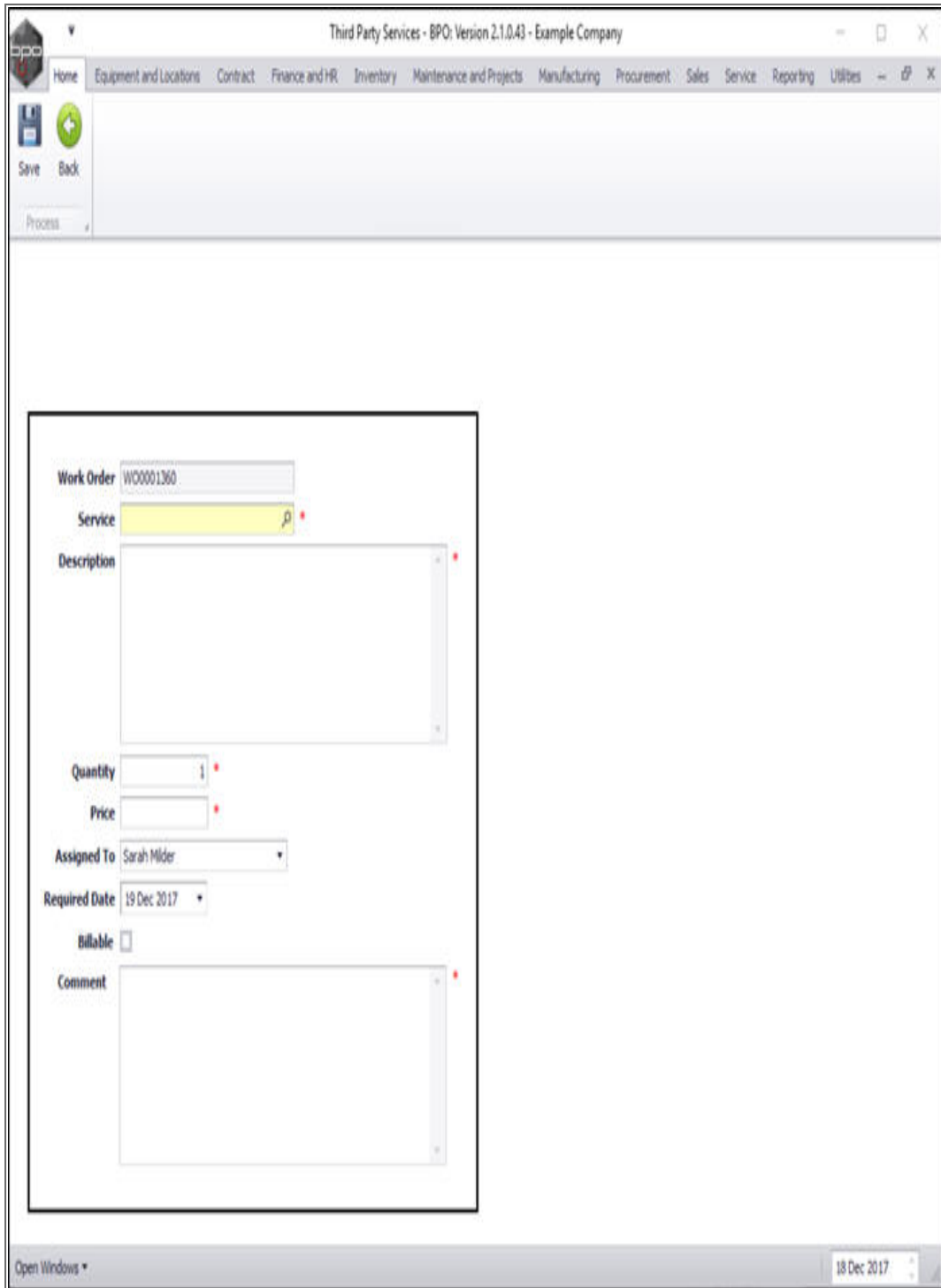
Either process will bring the **Service Requests for WO Code []** screen.

- Click on **Add**.



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.



Third Party Services - 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

Work Order: W00001360

Service: [dropdown]

Description: [text area]

Quantity: 1

Price: [text box]

Assigned To: Sarah Milder

Required Date: 19 Dec 2017

Billable:

Comment: [text area]

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- When you have finished adding the details to the Third Party Services screen, click on **Save**.

Third Party Services - 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

Work Order: WO0001360

Service: DEL

Description: Delivery Fee - Serial No 20-852963

Quantity: 1

Price: 350.00

Assigned To: Sarah Milder

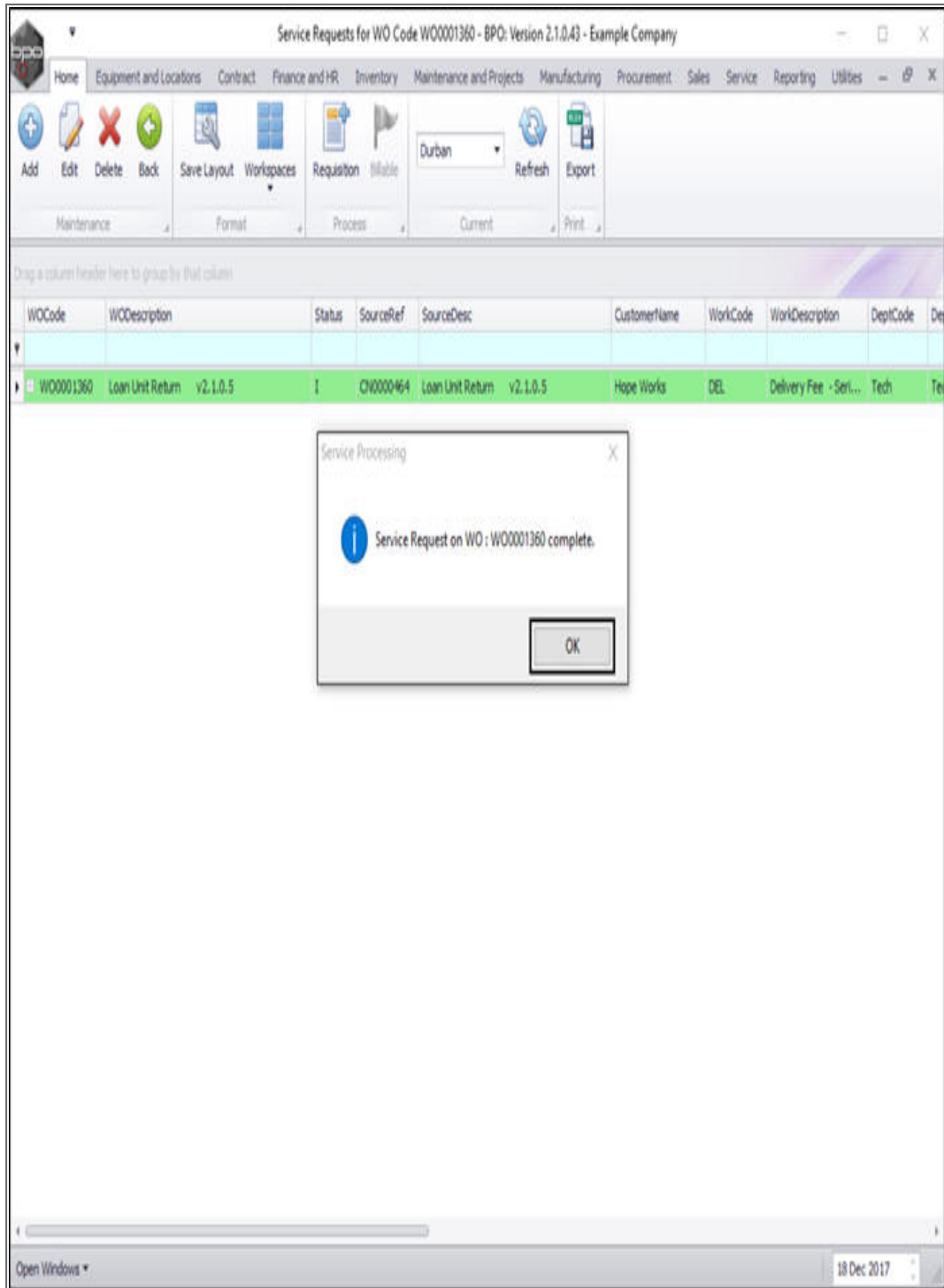
Required Date: 19 Dec 2017

Billable:

Comment: Delivery before 14:00.

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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.

Service Requests for WO Code WO0001360 - 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

Add Edit Delete Back Save Layout Workspaces Requisition Billable Durban Refresh Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

WCode	WDescription	Status	SourceRef	SourceDesc	CustomerName	WorkCode	WorkDescription	DeptCode	DeptName	Quantity	Source
WO0001360	Loan Unit Return	v2.1.0.5	ON0000464	Loan Unit Return	v2.1.0.5	Hope Works	DEL	Delivery Fee - Serial No 20-852963	Tech	Technical	1

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