

We are currently updating our site; thank you for your patience.

## SERVICE

## **SERVICE REQUESTS - ADD SERVICE REQUEST**

A Service Request needs to be raised when a supplier is providing a service for a work order.

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

The list of services you can select and request are set up in <u>Services</u>.

A Service Request must first be raised in order to create the <u>Service Requis</u>ition.

**Ribbon Access:** Service > Service Requests

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10.1	۵.	Equipment	/Locations	Contract	Finance / HR	Inventory	Mainten	ance / Projects	Manufacturi	ng Pro	curement	Sales Ser	vice Reportin	g Utilitie	S			
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Te	th Map	Scheduling	Current Tech Activity	Technicians	Availability Exceptions	Site Exceptions	Calls	Call Requests		Service Requests	WIP	Work Managemen	nt Time Review	My Work Orders	My Tickets	All Open Tickets	My Work	
			Te	chnical						Process					Ticketing		Open W 4	6

- 1. The **Service Requests** listing screen will be displayed.
- 2. Select the **Site** where you wish to create a service request.
  - The example has **Durban** selected.
- Click on the **row** of the work order(s) you wish to link a service request to.
- 4. Click on Add.

Short cut key: Right click to display the Process menu list. Click on Add.



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· WO0006242	1MMS - 1 Month Machine	PRJ0000413	PRJ408/BS001	BEA001	Bearing and Shoe				Requisition Required	CALL	
WO0006139	SP1912_NDS_2 - Network	. PRJ0000414	Sprint SP1912 New Deal Sale	HOP001	Hope Works (Pty) Ltd				Requisition Required	TRA	
· WO0006228	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006138	SP1912_NDS_1 - Machine	. PRJ0000414	Sprint SP1912 New Deal Sale	HOP001	Hope Works (Pty) Ltd				Requisition Required	DEL	
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WO0006223	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006221	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006135	PRJ408/1	CN0005273	PRJ408/1	OFF001	Office Supplies Unlimited			SORD	Requisition Required	CALL	
WO0006137	PRJ408/BS001	PRJ0000413	PRJ408/BS001	BEA001	Bearing and Shoe			SORD	Requisition Required	CALL	
WO0006198	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006195	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006193	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006170	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006167	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006163	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006131	1818-1-1 - Check network	PRJ0000411	Site Inspection	HOP001	Hope Works (Pty) Ltd				Requisition Required	DEL	
WO0006128	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006123	1MMS - 1 Month Machine								Requisition Required	CALL	
WO0006122	1MMS - 1 Month Machine								Requisition Required	CALL	
· WO0006099	1MMS - 1 Month Machine								Requisition Required	CALL	
· WO0006096	1MMS - 1 Month Machine								Requisition Required	CALL	

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

## THIRD PARTY SERVICE DETAILS

- Work Order: This field will populate with the work order number you have selected.
- Service: Click on the search button to display the Select a service for this work order screen.
  - i. Click on the **row** of the service you wish to log for the work order.
  - ii. Click on OK.



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	Julanda Kessler 🔻				CALL	Call Out Fee Cleaning Fee		INT	SER	450.00		
Required Date	19/04/2022 -				DEA	Dealer Service Fee		EXT	SER	350.00		
Billable					DEL	Delivery Fee		INT	SER	550.00		
Comment					DES	Design consultation		INT	SER	750.00		
					INSP	Inspection		INT	SER	650.00		
					INST	Installation Fee		INT	SER	1.200.00		
					INST	Installation Fee		INT	SER	1,200.00		
					MYS	Meter Yield Short Fa	al	INT	SER	500.00		
				-	PRI	Printing		INT	SER	350.00	ea	
					SET	Settlements		INT	SER	500.00	ea	
					STCD	Short Term Contrac	t Deposit	INT	SER	1,000.00	ea	
					TEST	Test Service		INT	SER	550.00	ea	
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• **Description:** The service description will populate with the service you have selected.

**Note** that any additional useful information can be added to this field related to the supplier. This information will pull through to the purchase order.

- Quantity: Click to type in or use the **arrow** indicators to set the quantity required.
- **Price:** The price for the service will auto populate for the service selected. Click to type in an alternative price, if required.
- Assigned To: This field will auto populate with the name of the person logging the service. Click on the down **arrow** to select the person who is responsible for arranging the service, from the drop-down list.



- **Required Date:** The date will default to the current date. Click to type in or click on the down **arrow** to use the calendar function to change the date, if required.
- **Billable:** It is important to note whether this service request is **Billable** or not. Click on the check box if this service is billable.
- **Comment:** Click in the field to type in a comment related to the third party services request.
- 10. When you have finished adding the third party services request information, click on **Save**.

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- 11. You will return to the **Service Requests** screen.
- 12. When you receive the **Service Processing** message to confirm that;
  - Service Request on WO: [work order number] complete.
- 13. Click on OK.



## Service Requests - Add Service Request

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· WO0006259	Post Contract machine rep		Drum replacement required	HOP001	Hope Works (Pty) Ltd				
· WO0006242	1MMS - 1 Month Machine		PRJ408/BS001	BEA001	Bearing and Shoe				
· WO0006139	SP1912_NDS_2 - Network	PRJ0000414	Sprint SP1912 New Deal Sale	HOP001	Hope Works (Pty) Ltd				
· WO0006228	1MMS - 1 Month Machine								
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⊟ WO0006122	1MMS - 1 Month Machine								
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14. The service request you have added for the work order will display on the updated Service Requests screen.

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W00006137	PR3408/85001	PR.30000413	PR.3408.85001	BEA001	Bearing and Shoe			5080
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