

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

SERVICE

WORK ORDERS - INTERNAL SERVICES

You can raise a <u>non-stock</u> service, e.g. machine installation or a call out, which was provided to the customer, by logging an Internal Service.

Ribbon Access: Service > Work Orders

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	Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Se											Reporting	Utilities	
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- 1. The Work Order Listing screen will be displayed.
- 2. Click on the **row** of the **work order** you wish to **log** an **internal service** to.
- 3. Click on the **Services** tile.



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unctions 🔮	a 🛛 c	8 C	A C	a 🗖 c	a 🗖 c	8 0 0	-		880
	· WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2 Yes	
Time	· WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2 No	
	▼ E WO0006256	IMP	CN0005302	New machine implementation. Installation	No	New machine implemen	. 24/01/2022	1 No	
	▶ E WO0006257	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	19/01/2022	2 No	
Services		PR.	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3 No	
		REP	CN0005300	Printer displaying error code	No	Printer displaying error	18/01/2022	3 No	
		ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	. 18/01/2022	3 No	
Third Party Services		REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3 No	
	· WO0006249	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PR.300
	· WO0006248	SM		WS - Weekly Service	No		23/11/2021	2 No	PR.300
Dauta	· WO0006247	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PRJ00
Parts	· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PR.300
	· WO0006245	SM		WS - Weekly Service	No		23/11/2021	2 No	PR.300
	· WO0006243	SM		WS - Weekly Service	No		16/11/2021	2 No	PR.300
Loans	· WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	2 No	PR.300
	· WO0006241	SM		WS - Weekly Service	No		16/11/2021	2 No	PR.300
	· WO0006240	SM		WS - Weekly Service	No		16/11/2021	2 No	PR.300
Swap Outs	· WO0006238	PR		Test PQ Source Type Work Order	No		14/11/2021	5 No	
	· WO0006239	PR		Rollers need replacing	No		11/11/2021	3 No	PR.300
	WO0006237	SM		WS - Weekly Service	No		09/11/2021	2 No	
Meters									

- 4. The **Internal services for WO Code** [work order code] screen will be displayed.
- 5. Any Internal services already linked to the work order will display in the data grid.

ADD INTERNAL SERVICE

6. Click on Add.

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





- 7. The Internal Service screen will be displayed.
 - Work Order: The work order field will auto populate with the work order number that was 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 **non-stock service** you wish to add to the work order.
 - ii. Click on **OK**.



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Process a	· · · 、	2						~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Work Order W00006257	Select a se	rvice for this work order						
Service 2 *	Home							
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	ServiceCode	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxCode
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Price	CALL	Call Out Fee	INT	SER	450.00	ea	VAT	1
Billable	CLA	Cleaning Fee	INT	SER	500.00	ea	VAT	1
	DEA	Dealer Service Fee	EXT	SER	350.00	ea	VAT	1
0 →→	DEL	Delivery Fee	INT	SER	550.00	ea	VAT	1
· · · · · ·	DES	Design consultation	INT	SER	750.00	ea	VAT	1
	INSP	Inspection	INT	SER	650.00	ea	VAT	1
	INST	Installation Fee	INT	SER	1,200.00	ea	VAT	1
	INST	Installation Fee	INT	SER	1,200.00	ea	VAT	1
	MYS	Meter Yield Short Fall	INT	SER	500.00	ea	VAT	1
	PRI	Printing	INT	SER	350.00	ea	VAT	1
	SET	Settlements	INT	SER	500.00	ea	VAT	1
	STCD	Short Term Contract Deposit	INT	SER	1,000.00	ea	VAT	1
	TEST	Test Service	INT	SER	550.00	ea	VAT	1
	TOLL	Toll Fee	EXT	SER	250.00	ea	VAT	1A *
Open Windows 👻	1		User : Ju	ilandaK 24/02	2022 Version :	2.5.0.7	Example Company	v2.5.0.7

- The **service description** field will be populated with the service selected.
- Quantity: The quantity will default to **1**. Click to type in or use the **arrow** indicators to adjust the quantity, if required.
- **Price:** The price will auto populate with the price specified for the internal service. Click to type in an alternative price, if required.
- **Billable:** The billable check box will be selected by default. Click to deselect the check box if the service is **non billable**.
- When you have finished adding the non-stock service details, click on Save.



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- 9. You will return to the updated **Internal services for WO Code** screen, with the internal service you have created displaying in the data grid.
- 10. When you receive the **Service Processing** to confirm that;
 - Service inclusion on WO: [work order code] complete.
- 11. Click on OK.



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DEL Delivery Fee 1	1 550.00 No A	
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EDIT INTERNAL SERVICE

- 1. From the Internal services for WO Code [work order code] screen,
- 2. Click on the **row** of the internal service you wish to edit.
- 3. Click on Edit.

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

- 4. When you receive the Internal Services message to confirm;
 - Are you sure you want to edit this service [service code] on WO [work order code]?
- 5. Click on Yes.



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- 6. The **Internal Service** screen will be displayed.
- 7. Make the changes required to the internal service.
- 8. Click on **Save** to update the internal service.

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- 9. When you receive the **Service Processing** message to confirm;
 - Service inclusion on WO : [work order code] complete.
- 10. Click on OK.

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DELETE INTERNAL SERVICE

- 1. From the Internal services for WO Code [work order code] screen,
- 2. Click on the **row** of the internal service you wish to remove.
- 3. Click on Delete.

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

- 4. When you receive the Time Bookings message to confirm;
 - Are you sure you want to remove this service [service

code] on WO [work order code]?

5. Click on Yes.



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DEL Delivery Fee	1 500.00 No	A						
TEST Test Service	1 250.00 No	A						
•	Time Bookings <	e you want to remove this	ervice TEST on W	O WO0006257?	×			
Open Windows 🕶				User : JulandaK	25/02/2022	Version : 2.5.0.7	Example Company	v2.5.0.7

- 6. The internal service will be removed from the screen.
- 7. Click on **Back** to return to the **Work Order listing** screen.

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