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

SERVICE

MY WORK - LOG A PART REQUEST

The **My Work** screen deals with work that is assigned to a specific employee, i.e. when an employee is logged in, that employee can only see work orders assigned to themselves.

This screen has similar functionality to the call screen in that the employee can **request parts**, services and loan units; book time, travel and expenses; view customer and machine details (including warranty information).

The employee can request from a bill of material or from the **full part list**.

Remember: The part request will either be Auto Approved, or it will need to be authorised manually

Ribbon Access: Service > My Work

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The **My Work** listing screen will be displayed.

Either

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- Click on the **row selector** in front of the **work order** that you wish to log a **part request** for.
- Click on **Edit**.

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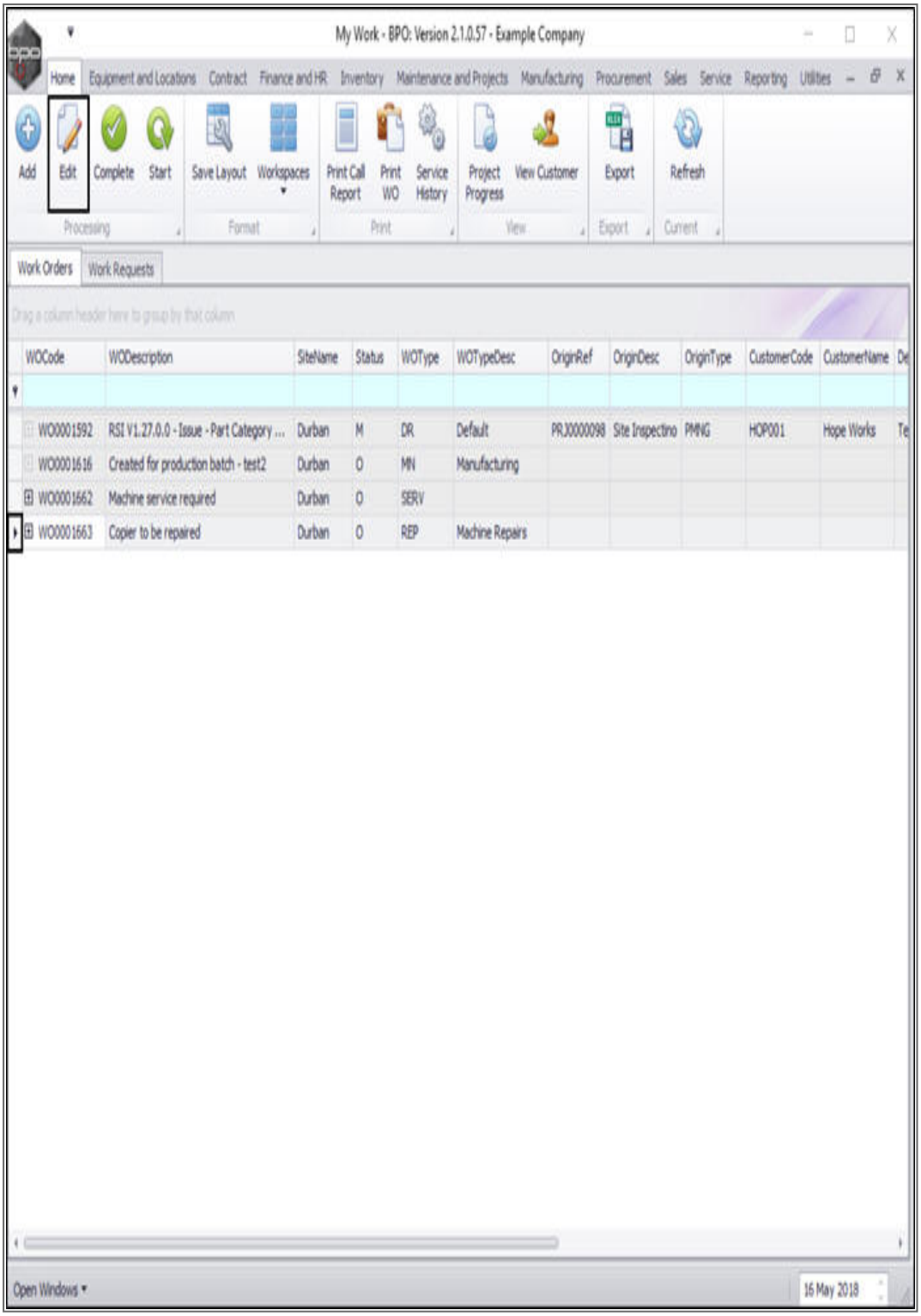

The **Maintain WO - Ref [ ]** screen will be displayed.

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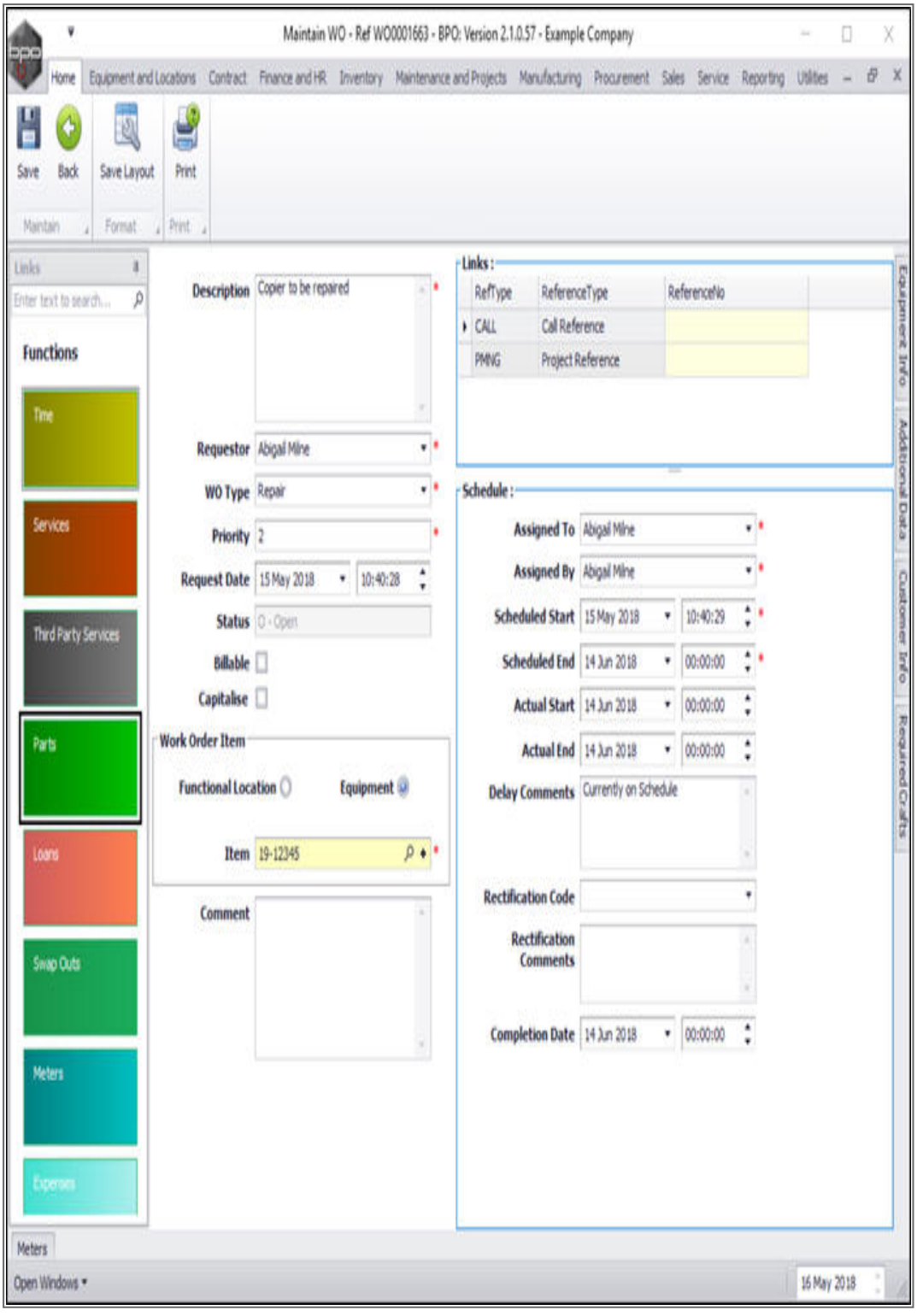
- Click on the **Parts** tile.



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Or

In the My Work listing screen,

- **Right click** anywhere in the **row** of the **work order** where you wish to log a **part** request.
- A **Process** menu will pop up.
- Click on **Parts** - Part Requests

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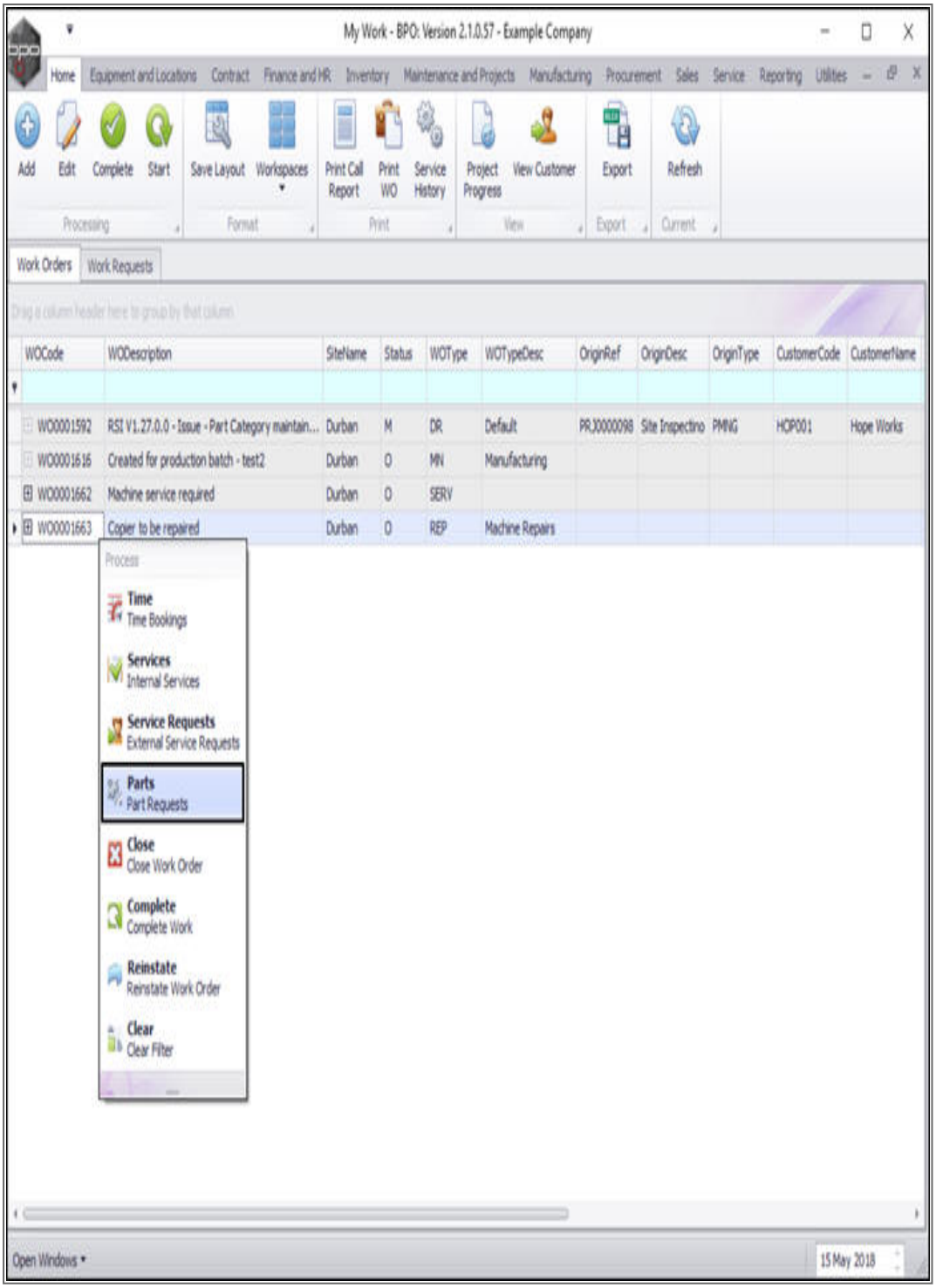

Either process will bring you to the **Part Requests for WO Code [ ]** screen.

- Click on **Add**.

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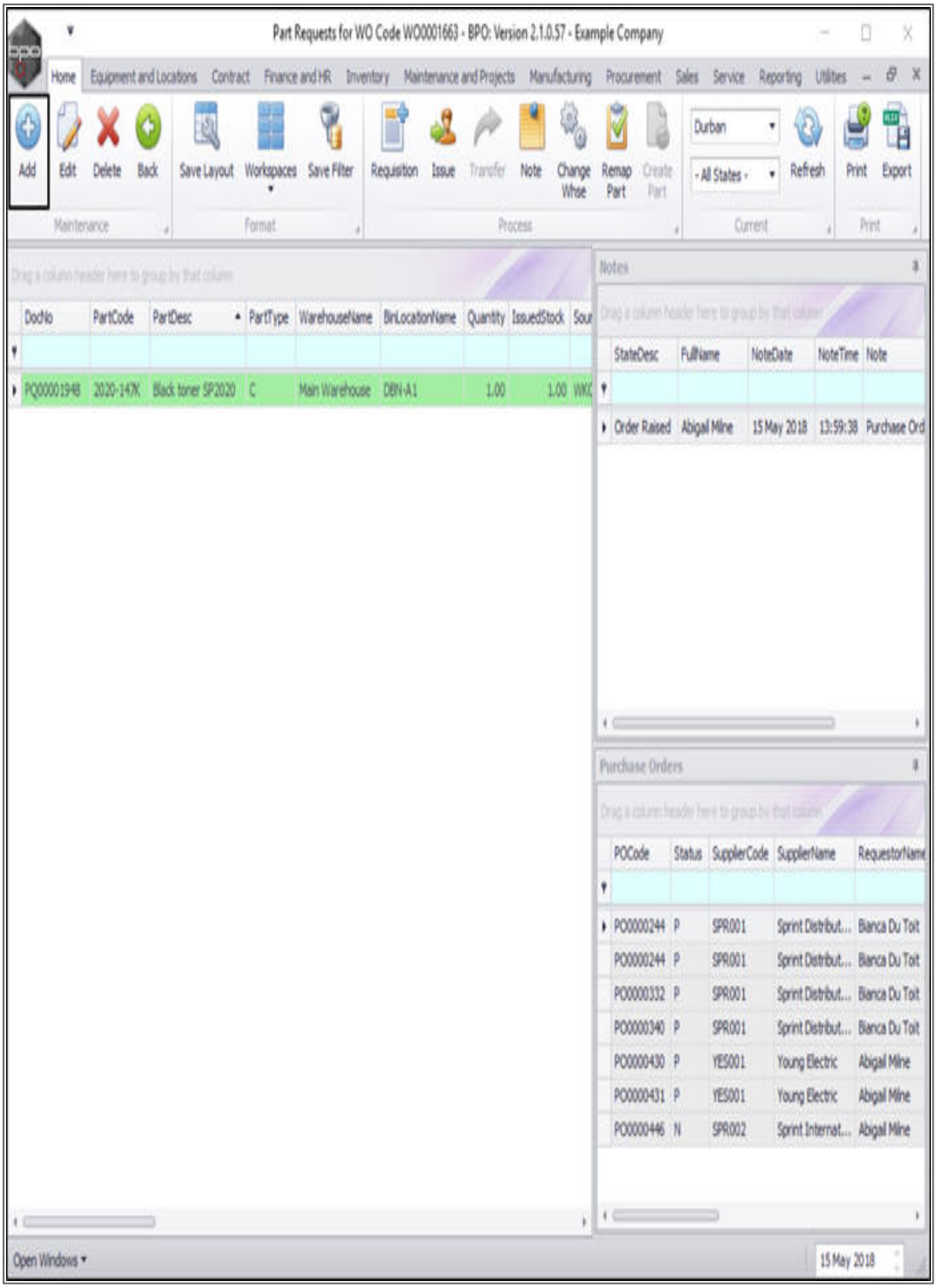

The **Part Requests** screen will be displayed.

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REQUEST FROM BILL OF MATERIAL

With this selection:

When you search for the **part number**, the system will only bring up a list of parts that belong to this machine. For this process, a 'part list **BOM**' must already be set up. View Bill of Materials for more details.

- Click on the **BOM** radio button.

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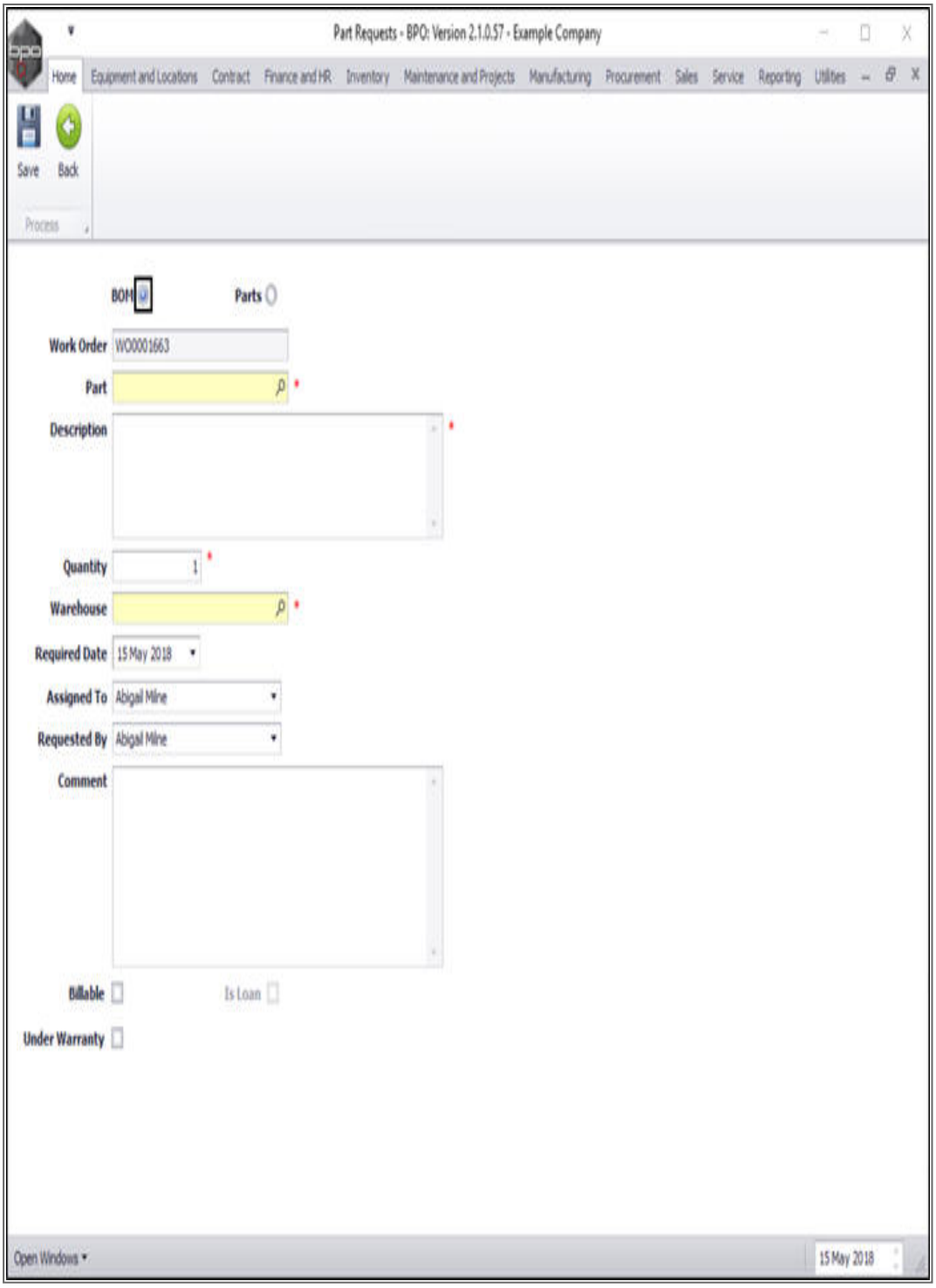

REQUEST FROM FULL PART LIST

With this selection:

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When you search for the **part number**, the system will bring up all part numbers.

- Click on the **Parts** radio button.

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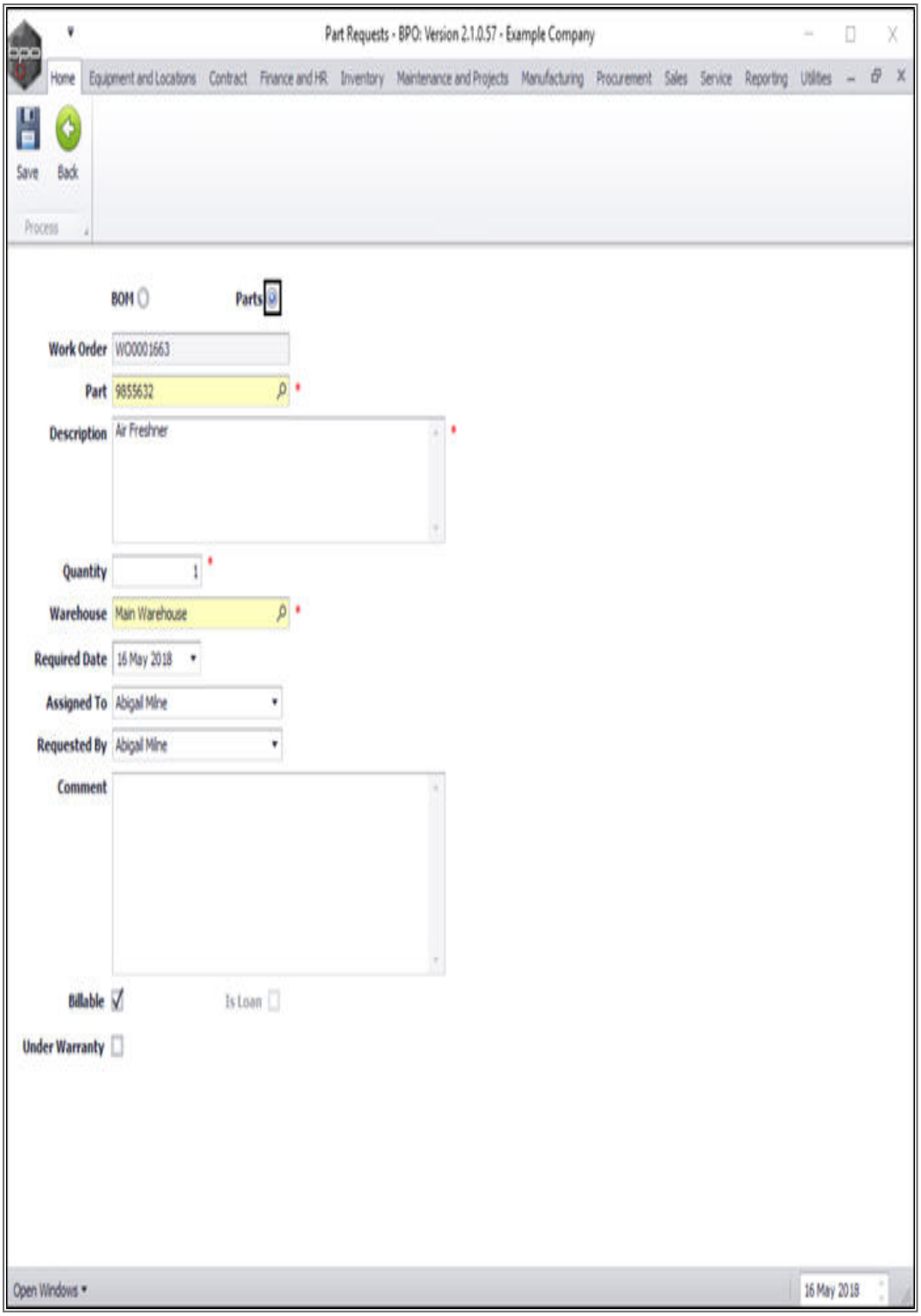

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- **Work Order:** This field will be auto populated with the initially selected work order number.
- **Part:** Click on the search button and select the part required.
    - If you clicked on the **BOM** radio button - you will only be able to select from a list of parts that belong to this machine as per BOMs already set up on the system.
    - If you clicked on the **Parts** radio button - you will be able to select from a list of all parts numbers on the system.
- **Description:** This will auto populate once you have selected the part in the previous step.
- **Quantity:** Click in this text box and type in the quantity required.
- **Warehouse:** Click on the search button and select the warehouse that you wish to request the part from.
- **Required Date:** Click on the drop-down arrow and either type in or use the calendar function to select the date required.
- **Assigned To:** Click on the drop-down arrow and select from the list the person responsible for the part request.
- **Requested By:** Click on the drop-down arrow and select from the list the person who requested this part.

- **Comments:** Type in any comments pertaining to this part request if required.
- **Is Billable:** Click on this check box if the part is billable.

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- **Note 1:** This will be set to **billable** by default, unless the part is linked to the contract as an inclusion.
- **Note 2:** Only stock items can be marked as billable, asset and loan requests will not be billable

- **Under Warranty:** Click in this check box in order to note whether the item replaced is under warranty. This does not process the item as a warranty claim part. View Warranty Claims introduction for more details.

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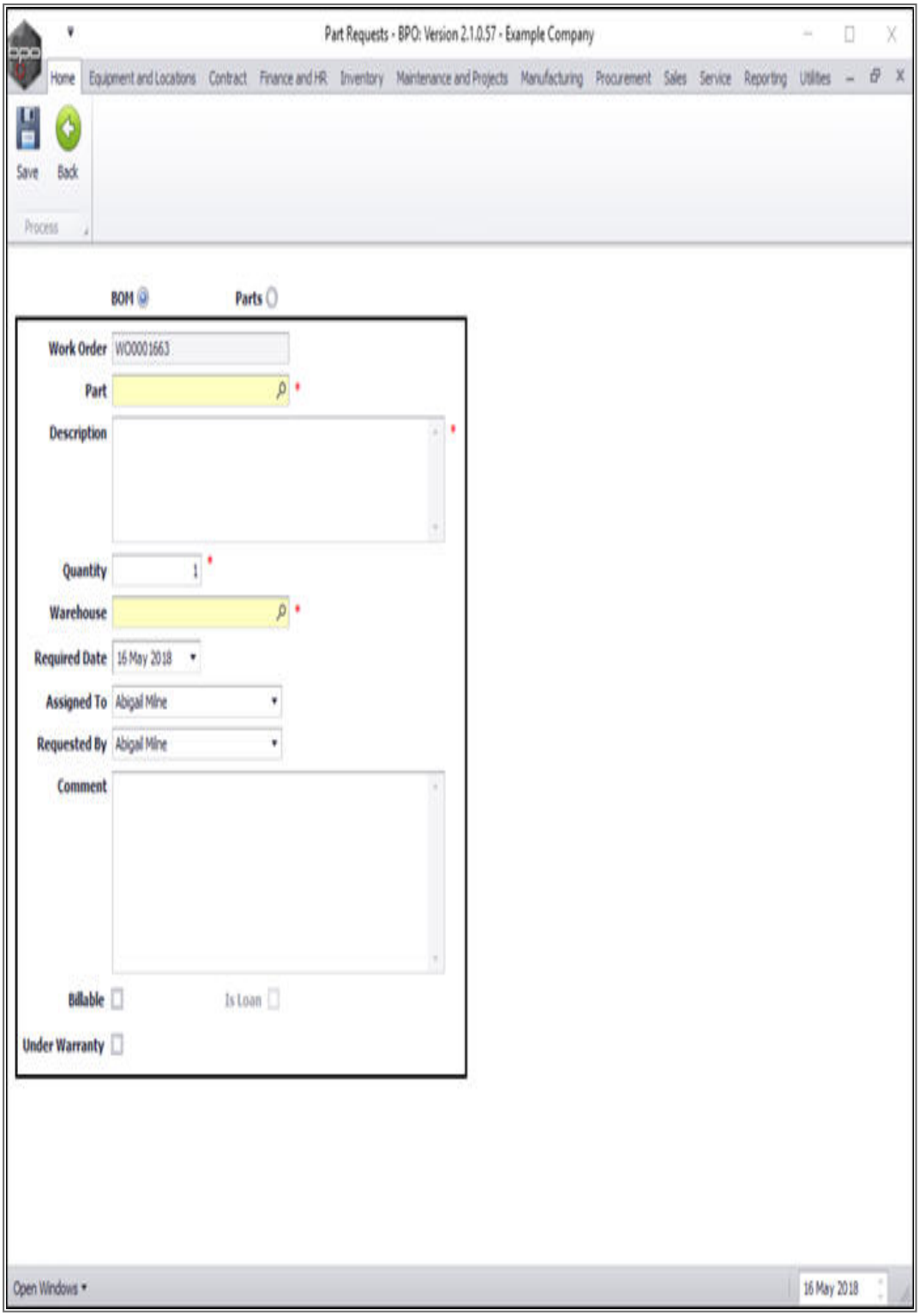

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- When you have finished adding the **part**or**BOM** request details, click on **Save**.
    - In this image, a parts request has been created for a drum which is not billable and noted not to be under warranty.

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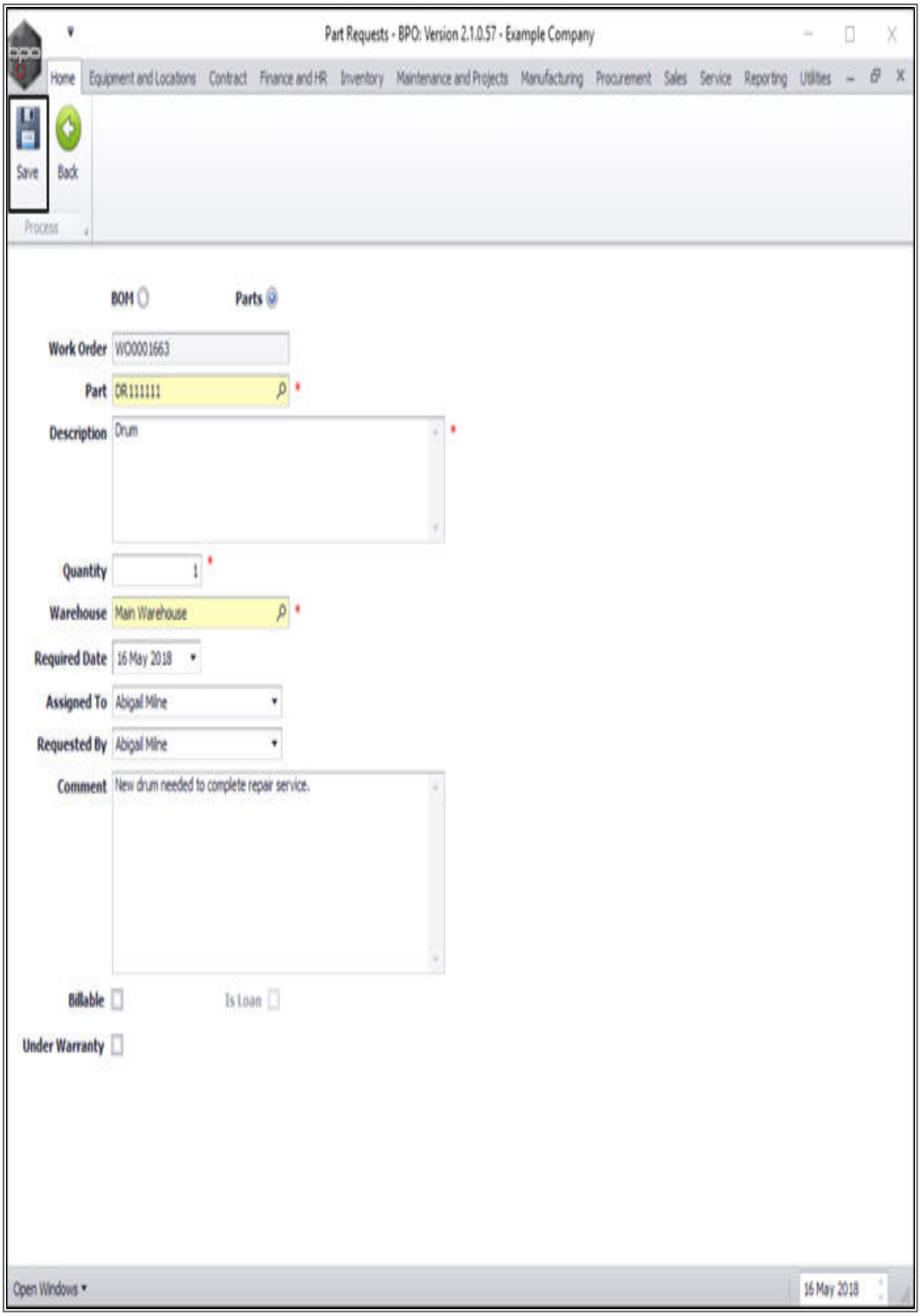

You will return to the **Parts Requests for WO Code [ ]** screen.

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- Here you can now view the new part request.
- A **Part Request Processing** message box will pop up informing you that;
    - **The part request for part [] has been saved successfully to WO: [].**
- Click on **OK**.

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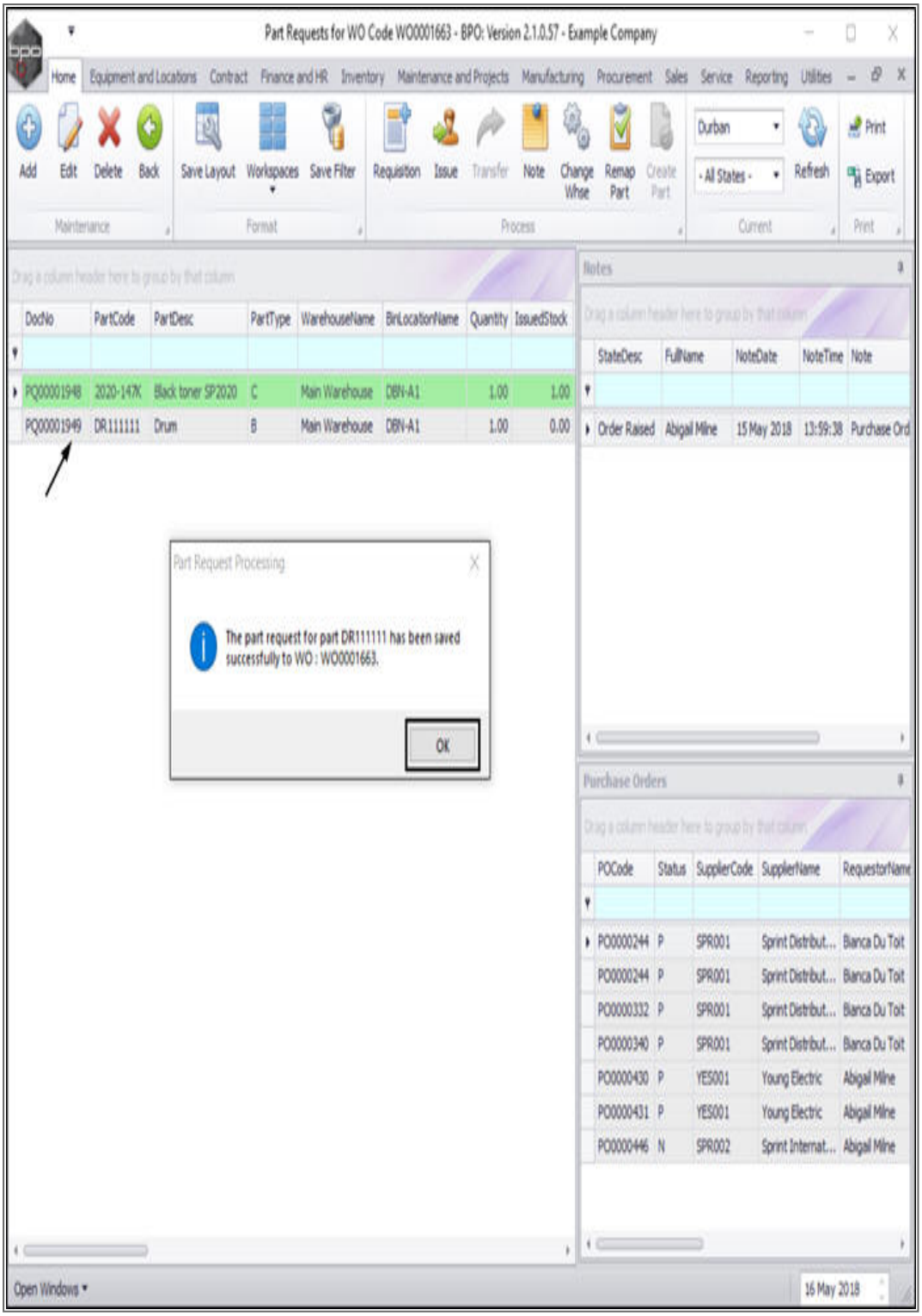

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- Follow the steps in Part Requests - Issuing Stock Items to complete the part request issuing process.

MNU.073.002

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