

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

SERVICE

MY WORK - ADD A THIRD PARTY SERVICE REQUEST

You will need to raise an **external** or **Third Party Service Request** when a <u>supplier</u> is required to provide a **service** for a work order.

From this Third Party Service Request, you can start a <u>Non-Stock Pro-</u> <u>curement</u> cycle:

- i. Raise a Purchase Order to the Supplier/Dealer
- ii. Raise a Non-Stock Goods Received Note
- iii. Create a Supplier Invoice.

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

Ribbon Access: Service > My Work



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



<u>Either</u>

- Click on the **row selector** in front of the **work order** that you wish to log a **third party** or **external service request** for.
- Click on Edit.

Help v2024.5.0.7/1.0 - Pg 3 - Printed: 21/08/2024

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E WO0001663	Copier to be repaired	Durban	0	REP	Machine Repairs					

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• Click on the Third Party Services tile.

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<u>Or</u>

In the My Work listing screen,

- **Right click** anywhere in the **row** of the **work order** where you wish to log an **external service** request.
- A Process menu will pop up.
- Click on Service Requests External Service Requests.

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

• Click on Add.



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• The Third Party Services screen will be displayed.



- Work Reference: Click on the search button and select from the pop up screen, the service required.
- Work Description: The service description will populate with the description of the service selected in the previous step.
 - You can update this field with 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 as 1 but you can type in the quantity required, e.g. **3**
- **Price:** The price will auto populate with what's set up on the selected sevice but you can type in another price if applicable.
- **Required Date:** This will default to the current date.
 - Either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Assigned To:** This will populate with the person currently logged on to the system.
 - You can click on the drop-down arrow and select an alternative person responsible for arranging the service, if required.
- Is Billable: Select this option if the service is billable.
 - Note: This will be set to 'billable' by default, unless the service is linked to a contract inclusion.
- **Comment:** Type in a comment regarding this external service request, if required.



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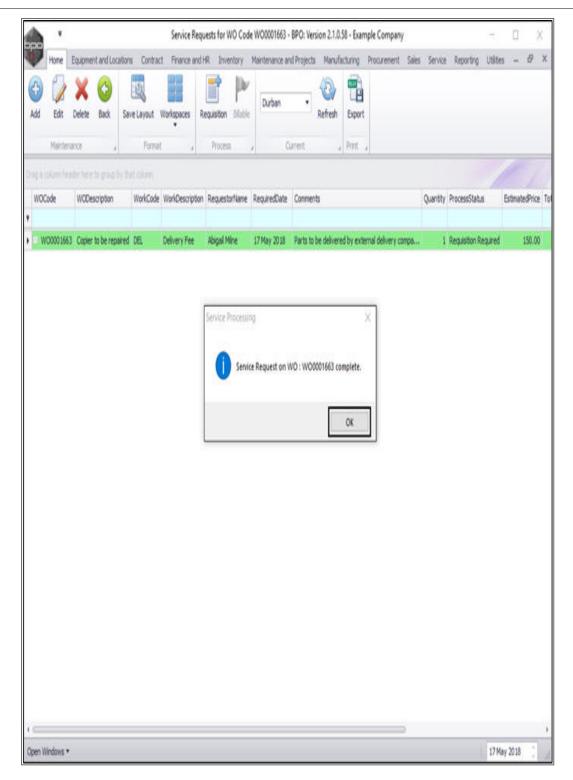
• When you have finished inputting the third party service request details, click on **Save**.

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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 newly added service request in this screen.



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 \checkmark Note that from BPO2 v2.5.0.14, you have the ability to add the same ser-

vice (non-stock item) more than once to a purchase requisition, and change the item description to differentiate between them.

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