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 supplier is required to provide a **service** for a work order.

From this Third Party Service Request, you can start a Non-Stock Procurement 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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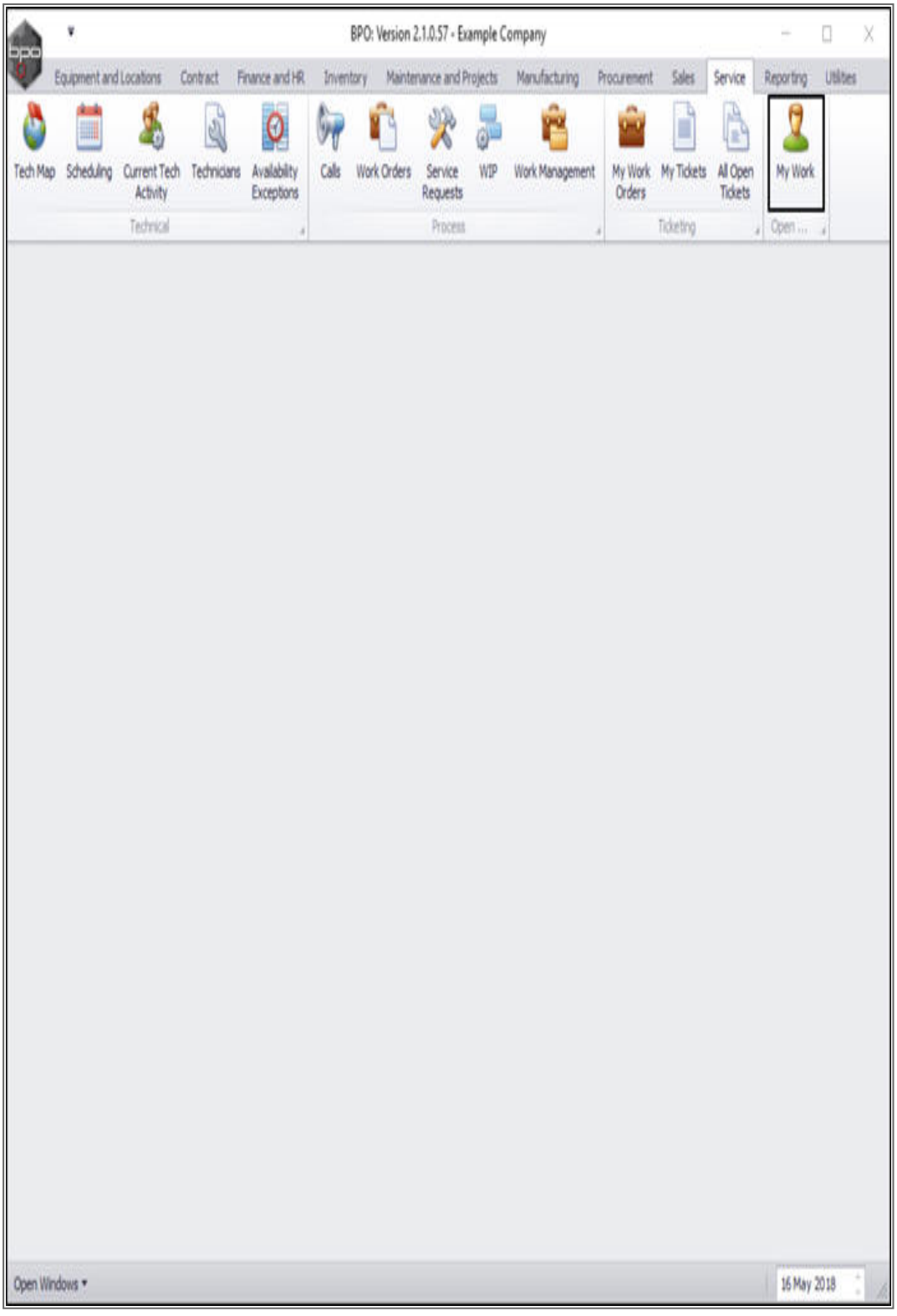

The **My Work** listing screen will be displayed.

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Either

- 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**.

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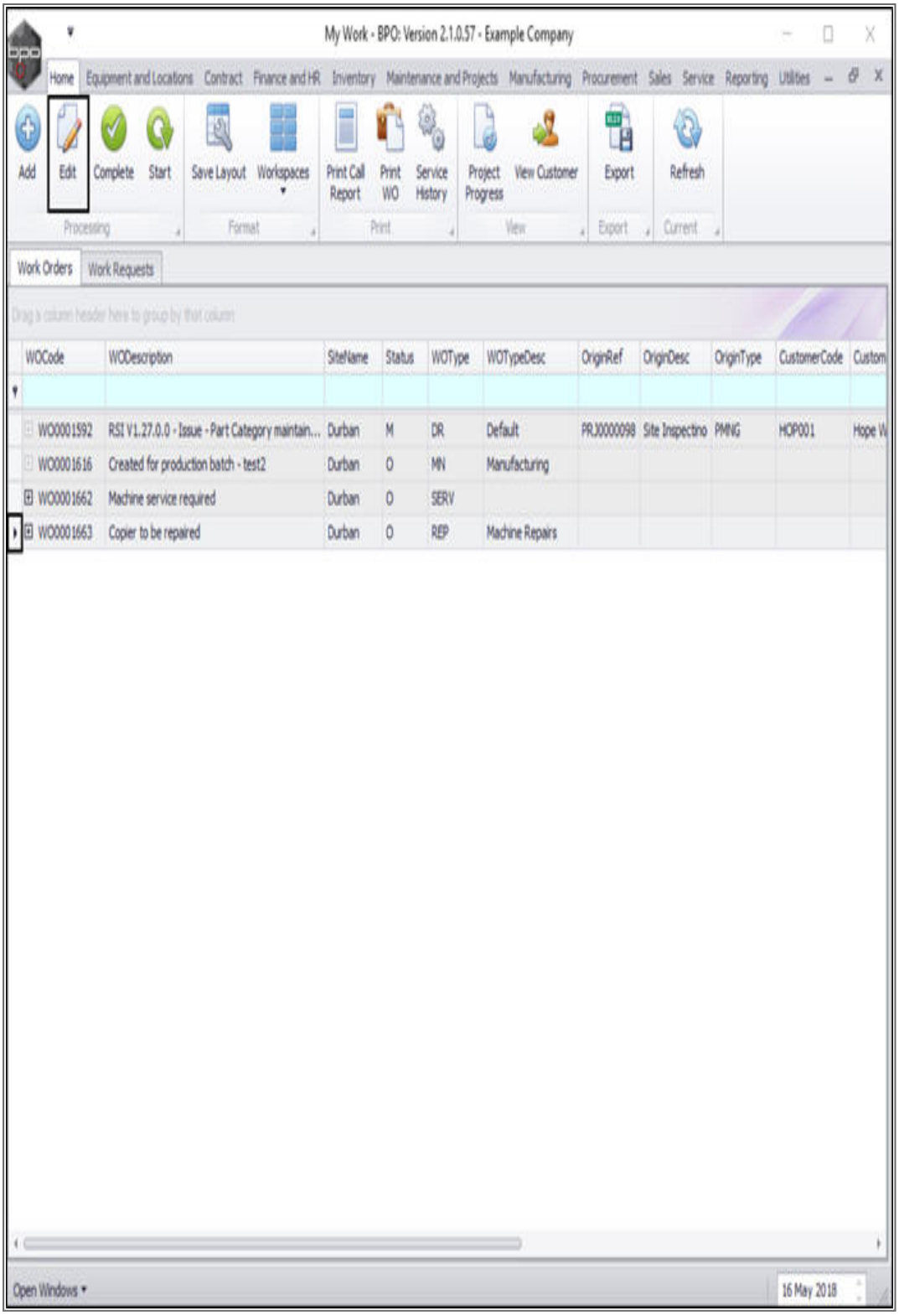

The **Maintain WO - Ref [ ]** screen will be displayed.

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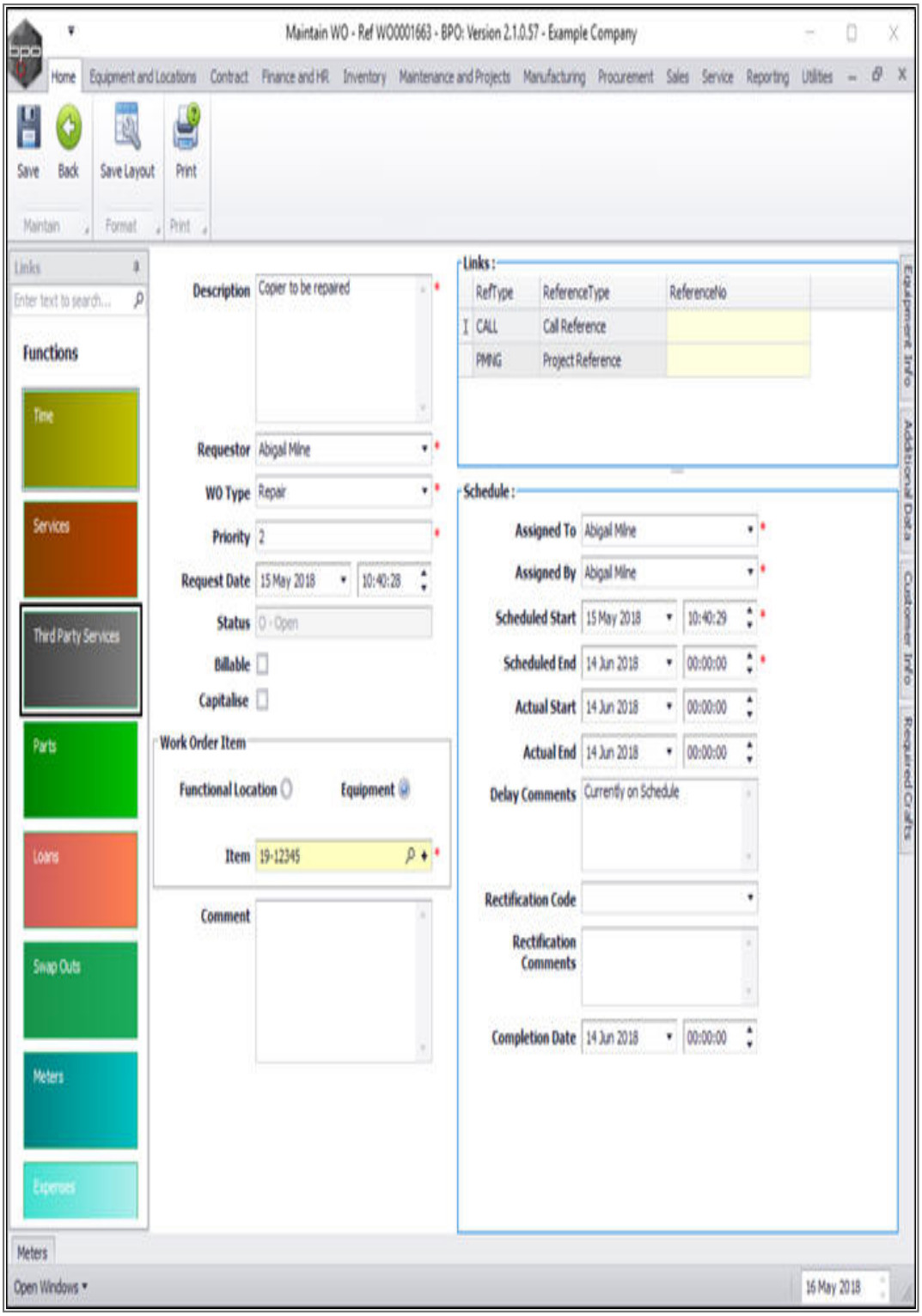
- Click on the **Third Party Services** tile.



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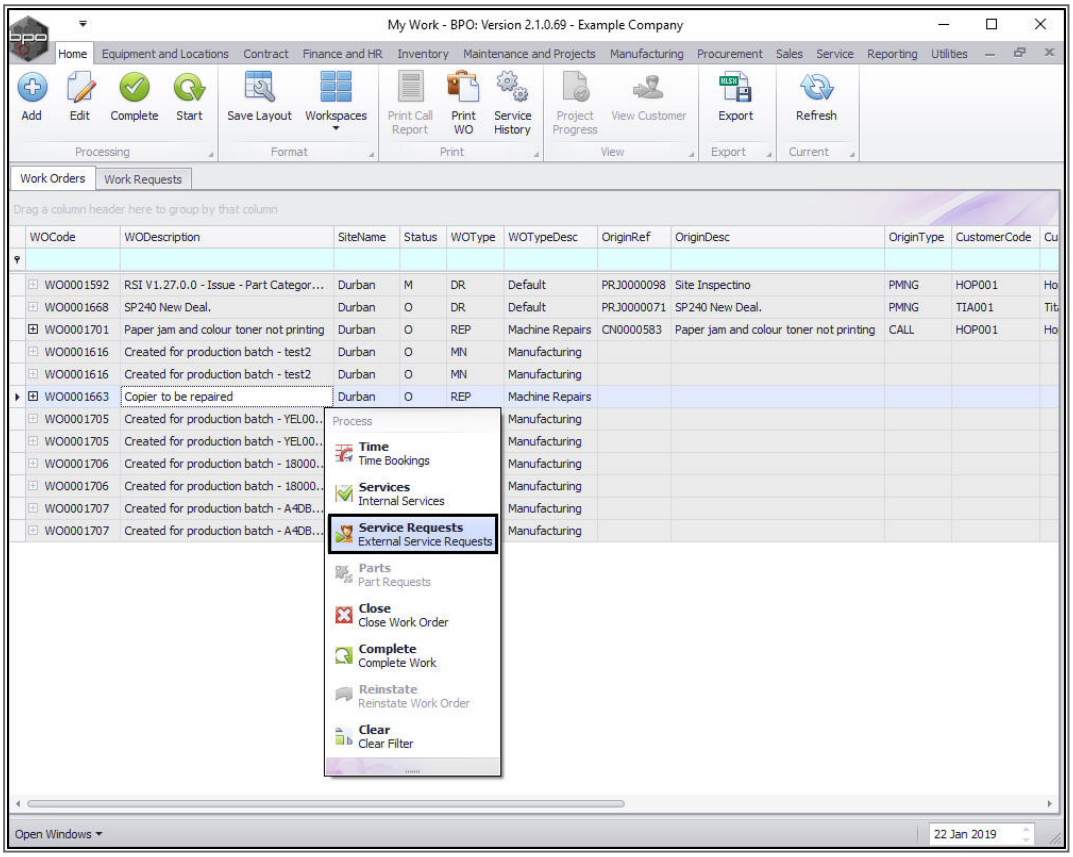
Or

In the **My Work** listing screen,

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



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

- Click on **Add**.

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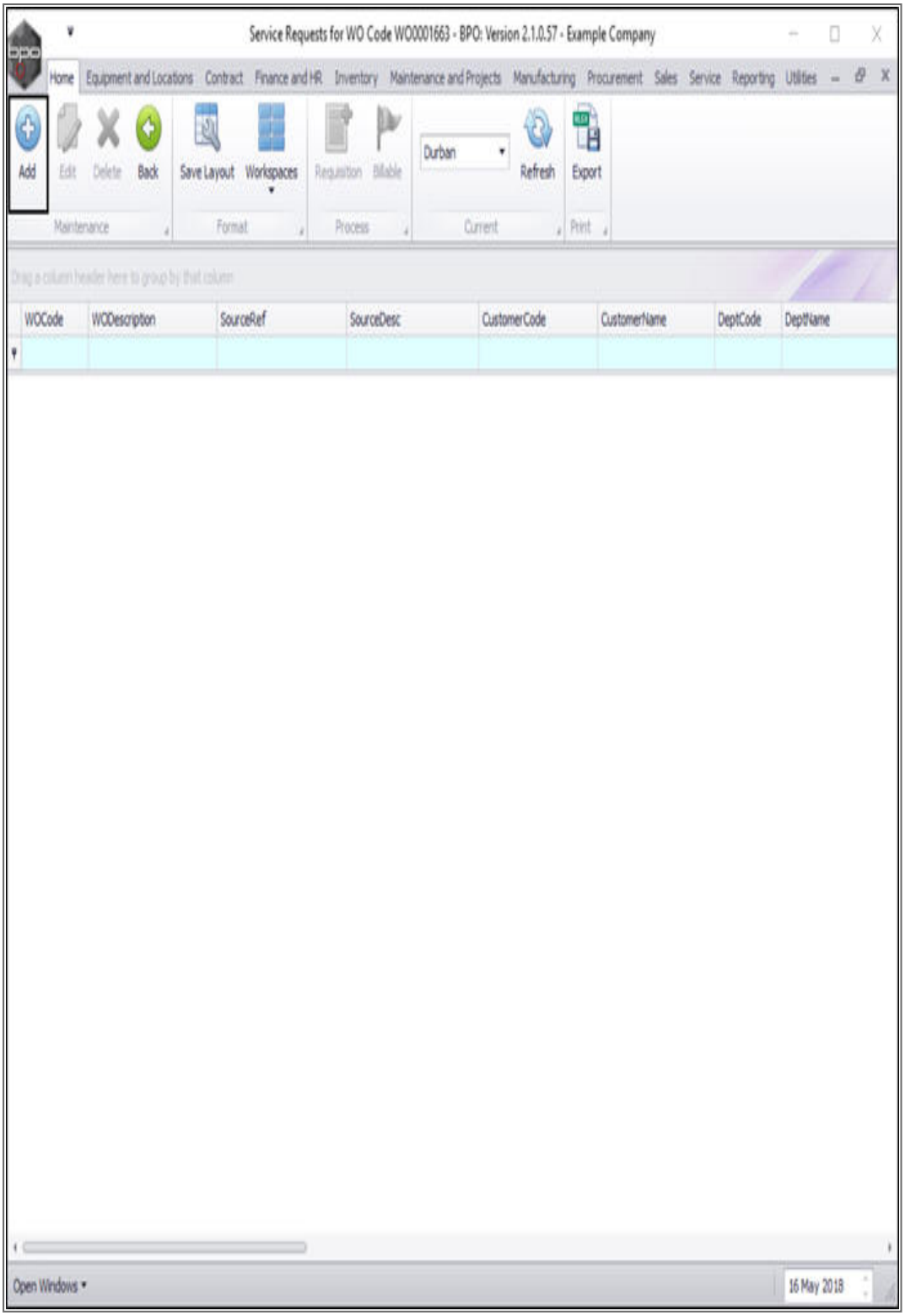

- The **Third Party Services** screen will be displayed.

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- **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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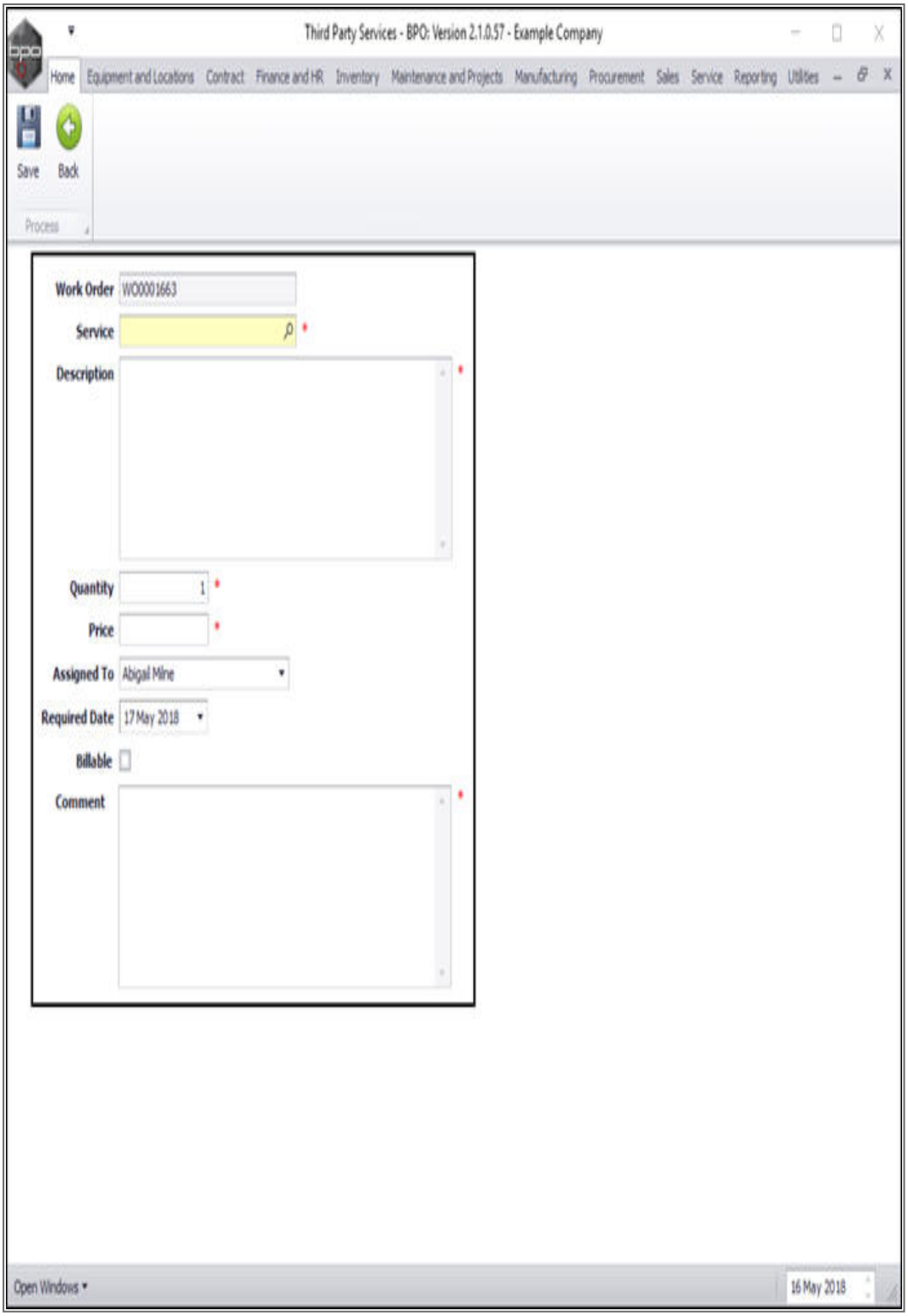

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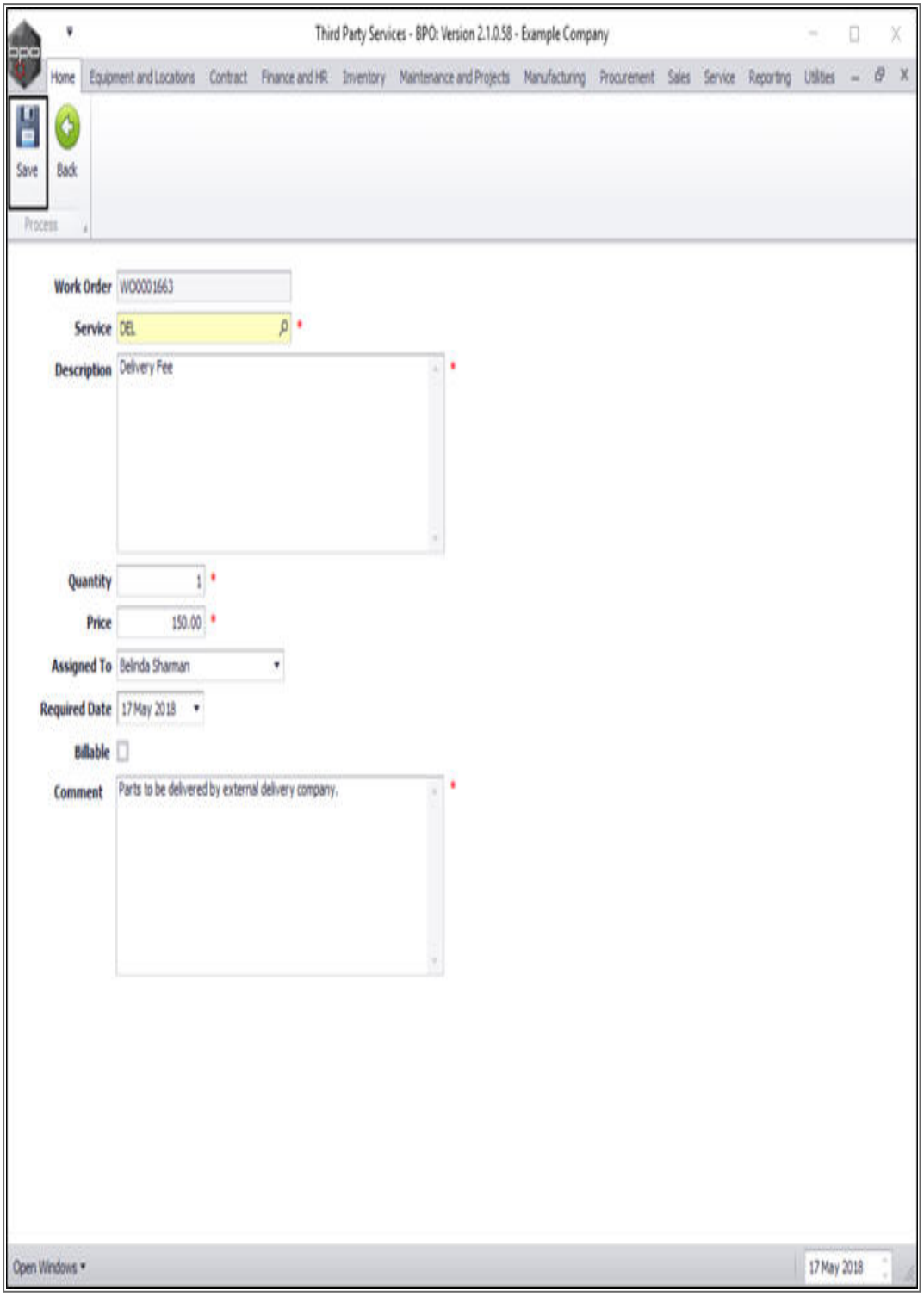
- When you have finished inputting the third party service request details, click on **Save**.



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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**.

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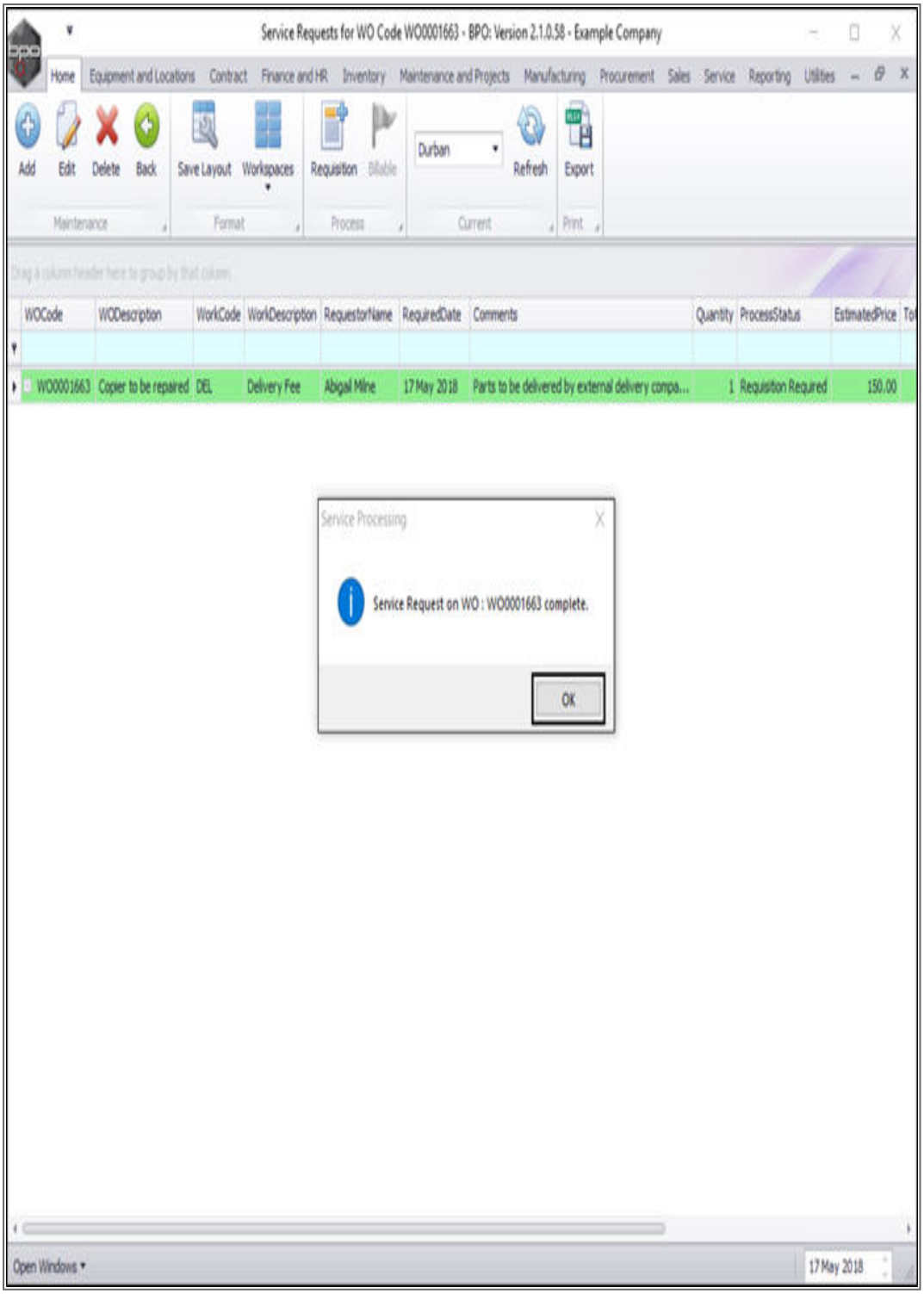

- You can now **view** the newly added service request in this screen.

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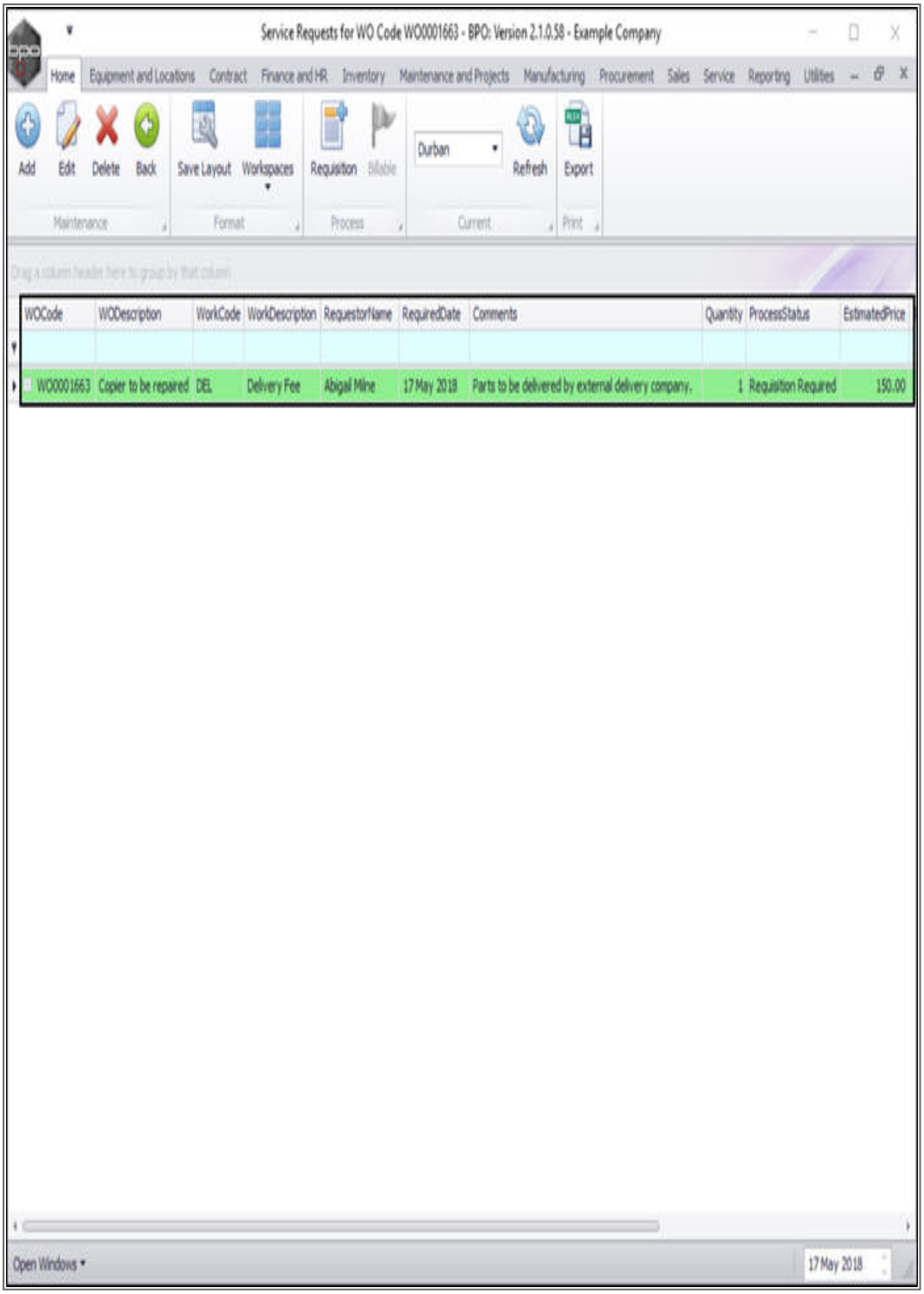

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Note that from BPO2 v2.5.0.14, you have the ability to add the same service (non-stock item) more than once to a purchase requisition, and change the item description to differentiate between them.

MNU.073.004

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