

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

# SERVICE

## **CALLS - REQUEST THIRD PARTY SERVICE**

You will need to raise a Service Request when, for example, a Supplier is providing a service for this call or a Dealer is performing this service on your behalf.

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

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

Ribbon Access: Service > Calls





The Call Listing screen will be displayed.



- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.

•				Call Listing	- BPO: Version 2.1.0.43 - Ex	imple Con	npany			1	D X
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Information	No Of Calls	1									
- Durban	48	CN0000507	12 Dec 2017	13:17:05	Paper not feeding throug		Repair	New	UnAssigned		2020-103
O New	25	CN0000506	12 Dec 2017	12:17:21	Paper Jam machine has s	REP	Repar	New	UnAssigned		12-98765
O In Pro	ogress 6	E CV0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-96523
🕑 Hold	3	CN0000504	22 Nov 2017	12:+6:33	HW001111	NOR	New Deal Rental	New	UnAssigned		
🙆 Pendi	ng 1	CN0000500	21 Jun 2017	12:06:28	ND5 - Test Credit and ret	NDS	New Deal Sale	New	UnAssigned		
O Comp	lete 10	CN0000499	21 Jun 2017	10:01:09	1234	NOS	New Deal Sale	New	Awaiting Acceptance	Ben John	
O AI	48	E CN0000498	20 Jun 2017	12:08:13	Test call for swap out - in	FR.	Parts Requirem	New	UnAssigned		2020-102
- 💽 Pretoria	0	E CN0000497	20 Jun 2017	08:27:27	Test edit call linked to ass	TEST	Testing	New	Awaiting Acceptance	Joel James	14-96523
New	0	E CN0000496	19 Jun 2017	12:14:44	TT002 · Weekly · Call per	9M	Scheduled Main	New	Awaiting Acceptance	Beinda S	
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O Hold	0	CN0000493	15 Jun 2017	12:28:25	Test ONote Totals for Pri	NDS	New Deal Sale	New	UnAssigned		
O Pendr		E CN0000489	07 Jun 2017	12:45:24	test	NOS.	New Deal Sale	New	UnAssigned		
O Comp	100	CN0000488	06 Jun 2017	10:20:09	Test creating a call with t	INST	Installation	New	UnAssigned		
O AI	0	CN0000486	01 Jun 2017	15:06:59	Call - Orders	NOR	New Deal Rental	New	UnAssigned		
		E (1000048)	31 May 2017	16:18:35	Bolass Quick Part Return	DR.	Select Call Type	New	UnAssigned		20-85296
		E CN0000481	31 May 2017	15:11:20	Quick Part Return v20.7	PR	Parts Requirem	New	UnAssigned		20-85296
		E CN0000480	29 May 2017		Test call with a location.	TEST	Testing	New		Susan D	
		E CN0000479	26 May 2017	_	Test saving a call inked t		Parts Requirem	New	UnAssigned		14-96523
		E CN0000478	25 May 2017		Invoice test v2.1.0.6 - F		Parts Requirem		UnAssigned		2020-432
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					Installation at client site	INST	Installation	New	UnAssigned		18-30200
					Contract Service v2.1.0.5			New	UnAssigned		1020-101
		E CN0000472	24 May 2017		Contract Service Test v2		Service	New	UnAssigned		2020-432
		CH0000467			Call - Loan Unit Request	20131	Repar	New	UnAssigned		20-85296
		E CN0000464			Loan Unit Return v2.1		Repair	New	UnAssigned		20-85296
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- Click on the **row selector** in front of the **call** you wish to raise a **service request** for.
- You can either click on **Edit**.

	*				Call Listing	- BPO: Version 2.1.0.43 - Ex	ample Con	npany			1	D X
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	O New	25	CN0000506	12 Dec 2017	12:17:21	Paper Jam machine has s	2014	Repar	New	UnAssigned		12-98765
	O In Progres	\$ 6	E CV0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-965236
	🕑 Hold	3	CN0000504	22 Nov 2017	12:46:33	HW001111	NOR	New Deal Rental	New	UnAssigned		
	Pending	1	CN0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret		New Deal Sale	New	UnAssigned		
	O Complete	10	CN0000499	21 Jun 2017	10:01:09	1234	NOS	New Deal Sale	New	Awaiting Acceptance	Ben John	
١.	O AI	48	B CN0000468	20 Jun 2017	12:08:13	Test call for swap out - in		Parts Requirem		UnAssigned		2020-102.
• 6	Pretoria	0	E CN0000497	20 Jun 2017	08:27:27	Test edit cal linked to ass	eta:	Testing	New	Awaiting Acceptance		14-965236
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	() Hold	0	E CN0000495	19 Jun 2017	12:03:24	TT071 • 2 Weekly • Call p		Scheduled Main		Awaiting Acceptance	Beinda S	sin123
	O Pending	0	CN0000493	15 Jun 2017	12:28:25	Test ONote Totals for Pri		New Deal Sale	New	UnAssigned		
	O Complete	0	⊡ CN0000489	07 Jun 2017	12:45:24	test	NOS	New Deal Sale	New	UnAssigned		
	O AI	0	CN0000488	06 Jun 2017	10:20:09	Test creating a call with t	INST	Installation	New	UrAssigned		
			■ CN0000486	01 Jun 2017	15:06:59	Call - Orders	NOR	New Deal Rental	New	UnAssigned		
			C (1000048)	31 May 2017		Bolass Quick Part Return	DR.	Select Call Type	New	UnAssigned		20-852963
			E CN0000481	31 May 2017	15:11:20	Quick Part Return v20.7	PR	Parts Requirem	New	UnAssigned		20-852963
			E CN0000480	29 May 2017		Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D	
			CN0000479	26 May 2017	15:03:59	Test saving a call linked t	PR	Parts Requirem	New	UnAssigned		14-965236
			CN0000478		15:03:21	Invoice test v2.1.0.6 · F	PR .	Parts Requirem	New	UnAssigned		2020-432
			CN0000475	25 May 2017	09:16:05	Swap out - asset on a sh	DR.	Select Call Type	New	UnAssigned	ļ	test98765
			E CN0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30200
			E CN0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	Π	IT Requirement	New	UnAssigned		1020-101
			E CN0000472	24 May 2017	14:38:10	Contract Service Test v2	SERV	Service	New	UnAssigned		2020-432
			E CN0000467	24 May 2017	09:29:20	Call - Loan Unit Request	REP	Répar	New	UnAssigned		20-85296
				23 May 2017	08:54:25	Loan Unit Return v2.1	REP	Repair	New	UnAssigned		20-85296



The Call maintenance: Call ref. - [] screen will be displayed.

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• Click on the Work Orders tile.



The Work Orders for Call Ref [] screen will be displayed.

- Work Orders for Call Ref CN0000464 BPO: Version 2.1.0.43 Example Company ų X Equipment and Locations Contract: Finance and HR: Inventory: Maintenance and Projects: Manufacturing: Procurement: Sales: Service: Reporting: Utilities: 🗕 🗗 🗙 Home Save Layout Durban ٠ Ľ LB 5 • Prod WO Öpen Workspaces • Print Export Add Edt Delete Vev Close Complete Renatate Reports 🕒 Refresh Save Filter Maintain Format Print Reports Process **Current** Links 4 Enter text to search.. p **fdWOCode** fidRequestDate fidStatus fidProjectRef fidProjectDesc fidWOType fidPriority fidInvoiceable fidSatchNo **fdDescription** Functions ۲ W00001360 Loan Unit Return v2.1.0.5 23 May 2017 0 REP 2 No Services Third Party Services Parts Swap Outs Meters 18 Dec 2017 Open Windows \*
- Click on Third Party Services.



- 1. or you can click on the **Expand** button on the **call** you wish to log a **service request** for and select the relevant **work order**.
- 2. **Right click** anywhere in the row of the **work order** where you wish to log a **service request** for and
- 3. select **Service Requests** Add New Third Party Service Request from the **Process** pop up menu displayed.

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

• Click on Add.



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The Third Party Services screen will be displayed.



- Work Order: This will auto populate with the work order number initially selected.
- Service: Click on the search icon and select the service required.
- **Description:** The description will populate as you select the above service. Type in 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 but can be changed by typing in the correct quantity.
- **Price:** The price will auto populate with what's set up on the system but can be changed by typing in the correct price.
- Assigned To: This will auto populate with the person currently creating the service request but you can click on the search icon and select an alternative person if required.
- **Required Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select a different date if required.
- **Billable:** Select this option if the service is billable.
  - Note: This will be set to billable by default, unless the service is linked to the contract as an inclusion.
- **Comment:** Type in any additional comments here if required.



·					ices - BPO: Version 2.1.0.43						7	D	
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Assigned To	Sarah Milder		•										
Required Date	19 Dec 2017 •												
Billable													
Comment					· •								

• When you have finished adding the details to the Third Party Services screen, click on **Save**.



•					T	iird Party Serv	ices - BPO: Version 2.1.0.43	Example Comp	any					۵	0
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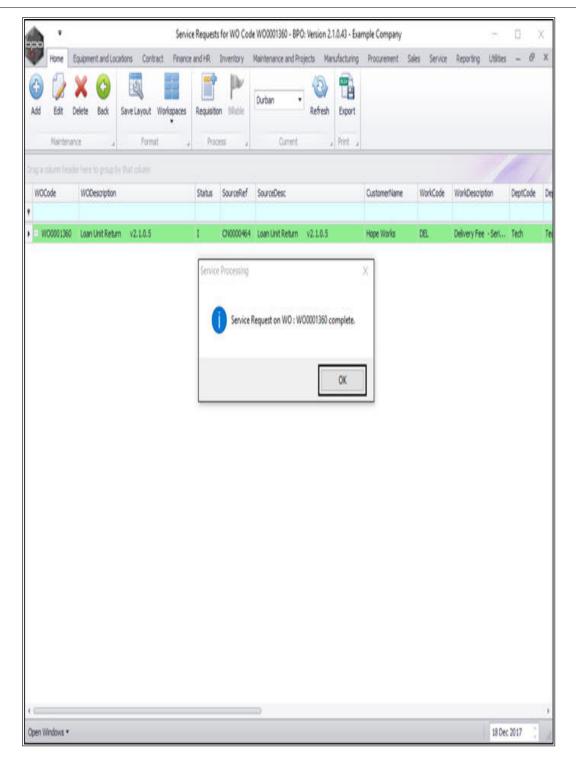


- You will return to the Service Requests for WO Code [] screen.
- A Service Processing message box will pop up informing you that;
  - Service Request on WO: [] complete.
- Click on OK.

Help v2024.5.0.7/1.0 - Pg 12 - Printed: 21/08/2024

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• You can now **view** the **service request details** in this screen.



100	٠					Servic	e Requests	for WO Co	de WQ000	1360 - BPO: Vers	ion 2.1.0.4	3 - Exar	nple Com	pany				0	X
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Help v2024.5.0.7/1.0 - Pg 14 - Printed: 21/08/2024



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.

MNU.122.009

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