# MANUFACTURING

PRODUCTION – ADD A THIRD PARTY SERVICE REQUEST

If you need a third party sub contractor to do work for you, then you can raise a **Third Party Service Request** from the **Production** listing screen.

From this Service Request, you can start a <u>Non-Stock Procurement</u> cycle, i.e. Raise a *Purchase Order* to the Supplier, a *Non-Stock Goods Received Note* and a *Supplier Invoice*.
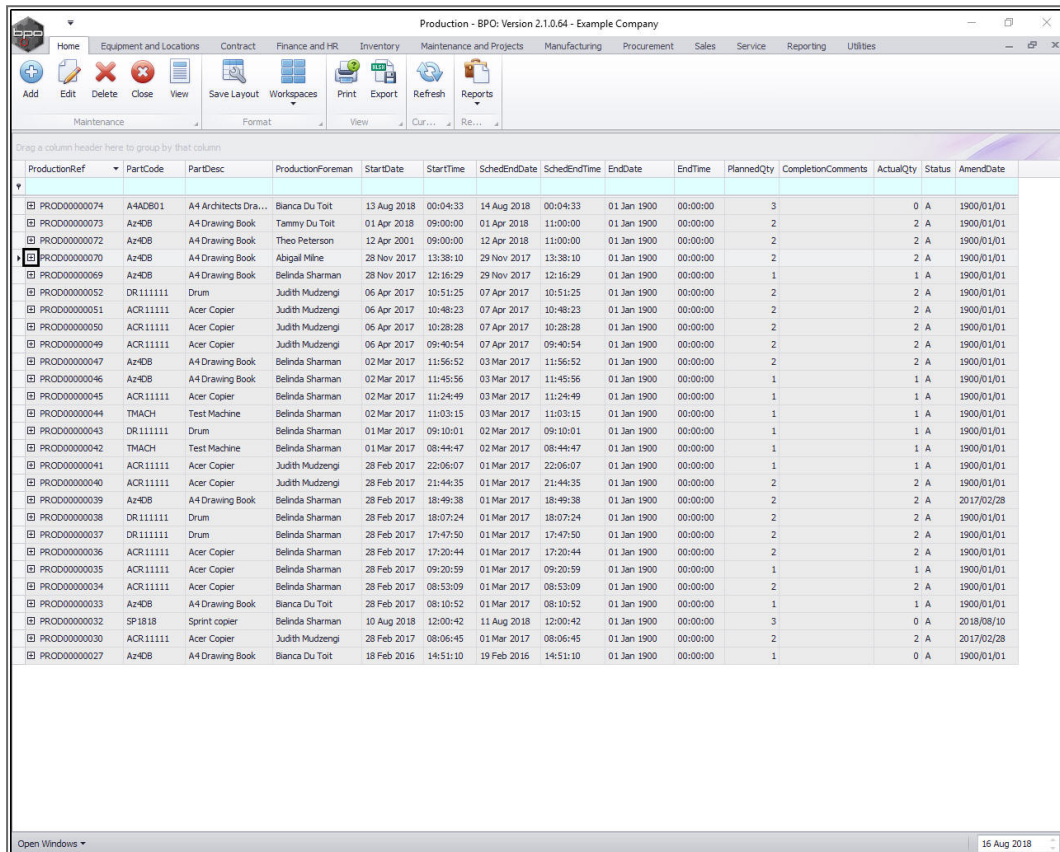
Ribbon Access: *Manufacturing > Production*
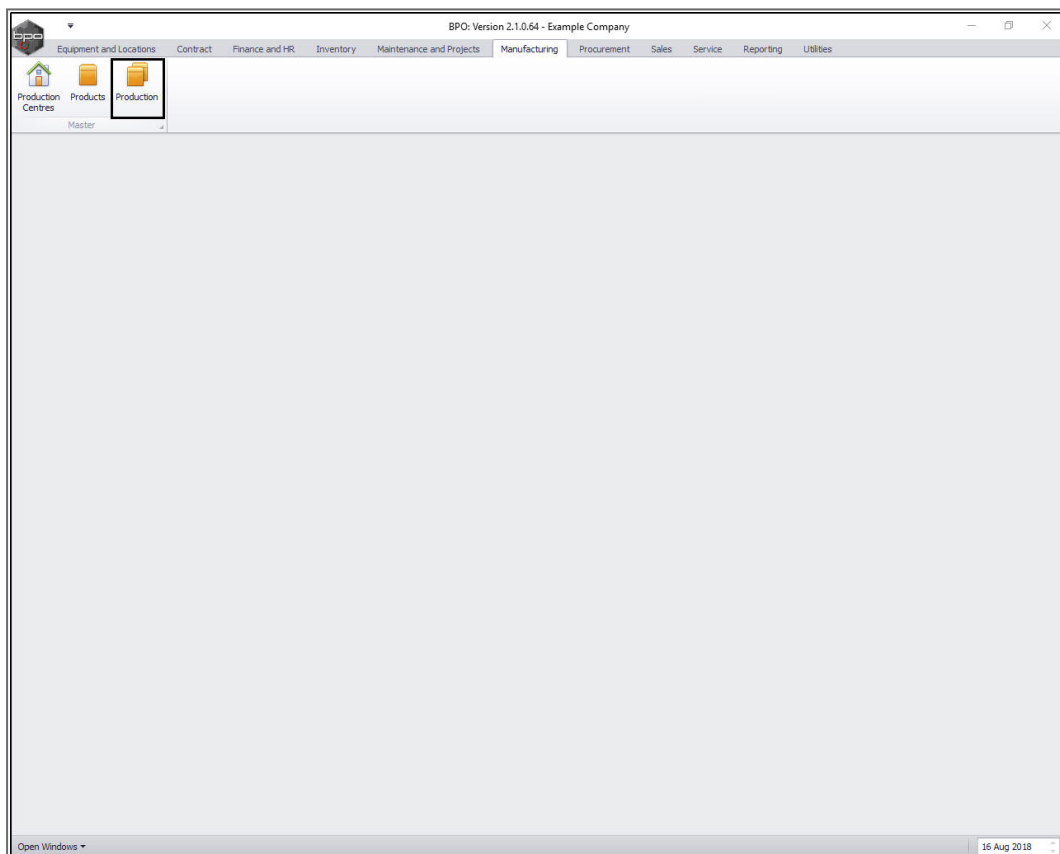
The *Production* listing screen will display.

SELECT PRODUCTION RUN

- Click on the *expand* button in the *row* of the *production run* that you wish to add a sub-contract service request to.

The *Production Work Orders* frame will be expanded.

SELECT WORK ORDER

- *Right click* anywhere in the *row* of the *work order* that you wish to link the sub-contract service request to.
  - Note: Remember or make note of, the selected work order number.

- A *Process* menu will pop up.

ADD THIRD PARTY SERVICE REQUEST

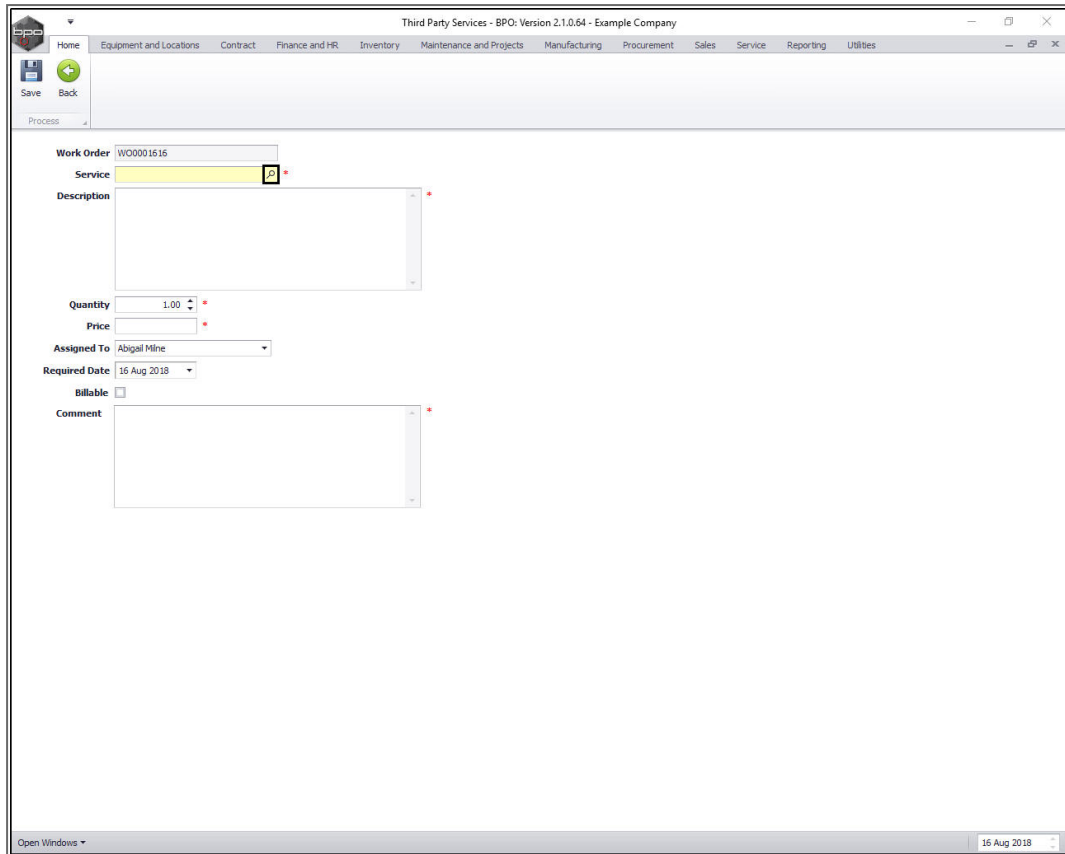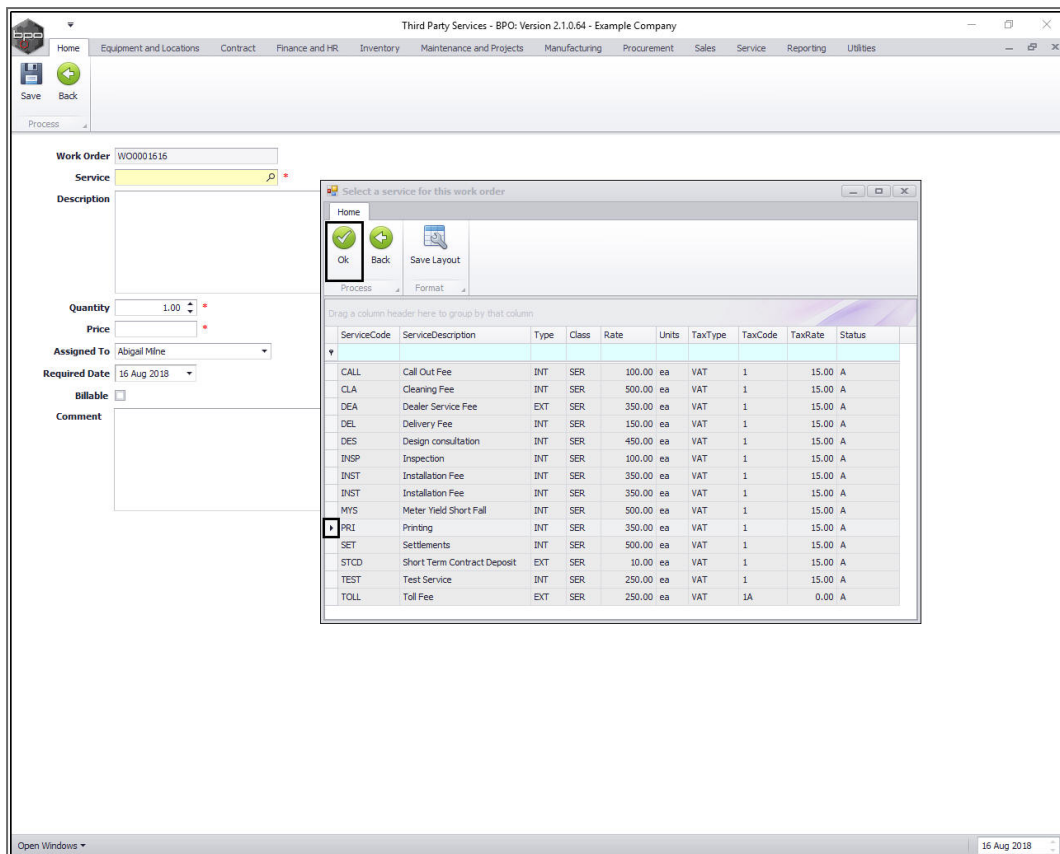- Click on *Service Requests* - Add New Third Party Service Request.

The *Third Party Services* screen will be displayed.

SEARCH FOR AND SELECT THE SERVICE

- The *Work Order* field will be auto populated with the previously selected work order number.
- Click on the *search* button in the *Service* field.

- The *Select a service for this work order* pop up screen will appear.
- Select the *row* of the *service* you wish to link to this work order.
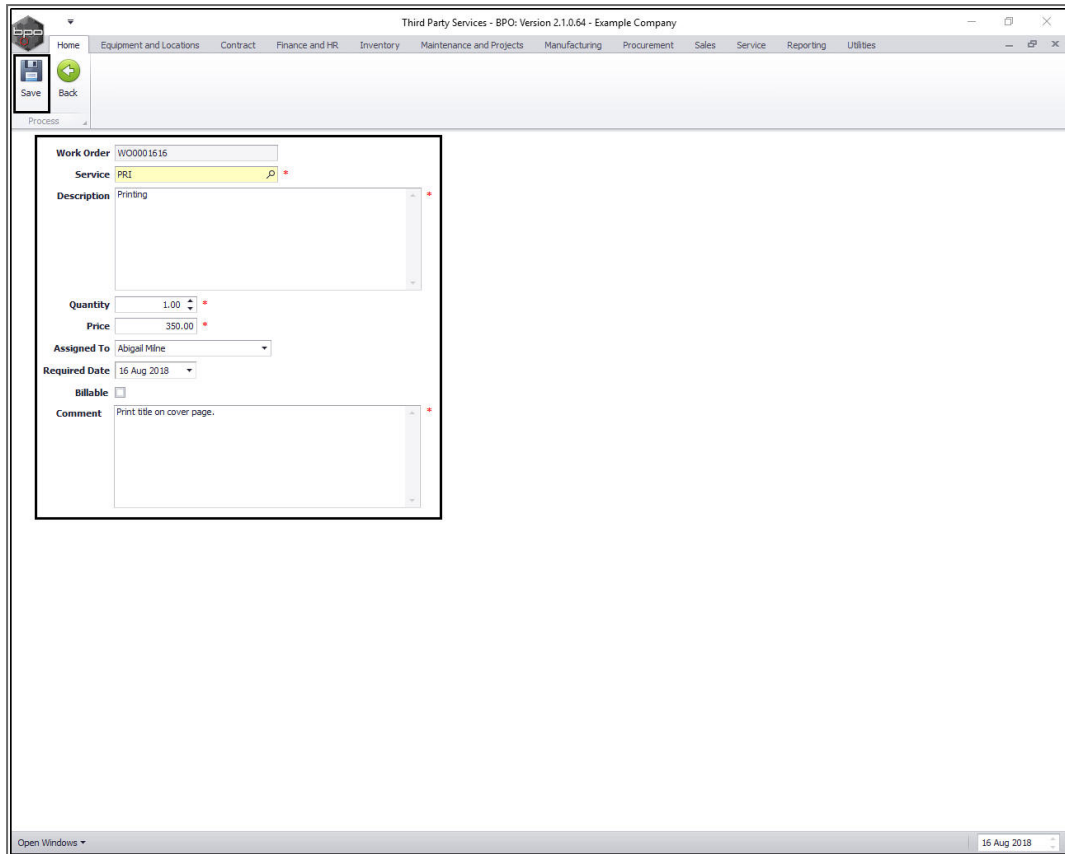- Click on *Ok*.

ADD SERVICE REQUEST DETAILS

- **Service:** This will now be populated with the service code selected in the previous step.

- **Description:** This will now be populated with the service description. Update this field with any additional relevant information for the Supplier, for example, serial number if applicable, as this detail will pull through to the Purchase Order.

- **Quantity:** This will auto populate with **1**. You can use the directional arrows to select an alternative quantity amount if required.

- **Price:** This will auto populate with the price of this service currently set up on the system. You can type in an alternative price if required.

- **Assigned To:** This will auto populate with the person currently logged on to the system. You can click on the drop-down arrow and select an alternative employee if required.
- **Required Date:** This will auto populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Billable:** This check box should be **un**ticked.
- **Comment:** Type a relevant comment regarding this third party service request.

SAVE LINKED SERVICE

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

You will return to the **Production** listing screen.

- A **Service Processing** message box will pop up informing you that;
    - *Service Request on WO: [ ] complete.*
- Click on **OK**.

VIEW LINKED WORK ORDER

- Now you can view the work order with the linked third party service request in **2** different screens.

  Either

IN THE <u>WORK ORDER</u> LISTING SCREEN

- Navigate to the *Work Order Listing* screen.

Ribbon Access: *Service > Work Orders*

- In the *Work Order Listing* screen, either use the Find WO button or use the Filter Row in the *WO Code* column to find the work order.

1. In this image, the *filter row* has been used to find the work order.
2. Ensure that the *row selector* is in front of the work order (if your search brought up more than one work order).
3. Click on the *Third Party Services* tile.
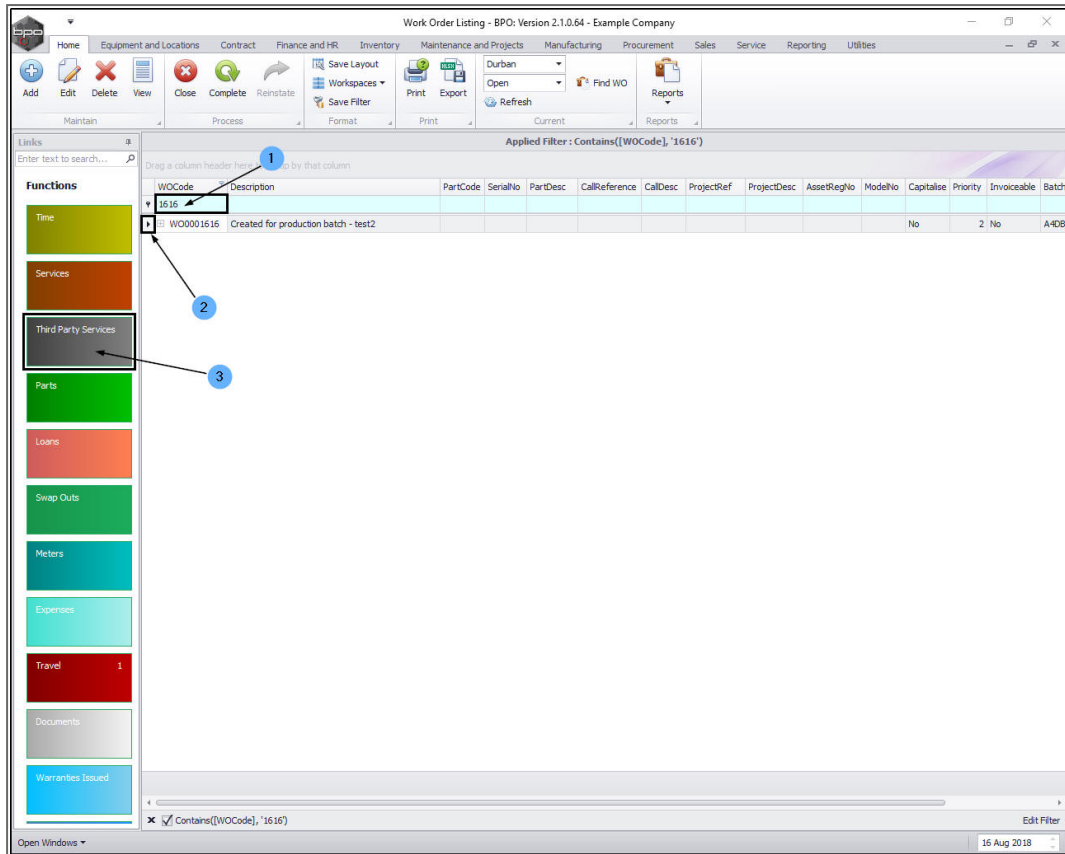
- The *Service Requests for WO Code [ ]* screen will be displayed.
- Here you can view the work order and the linked third party service request.
- You will note that the *Process Status* is *Requisition Required*. You will need to create a service requisition to complete this process.
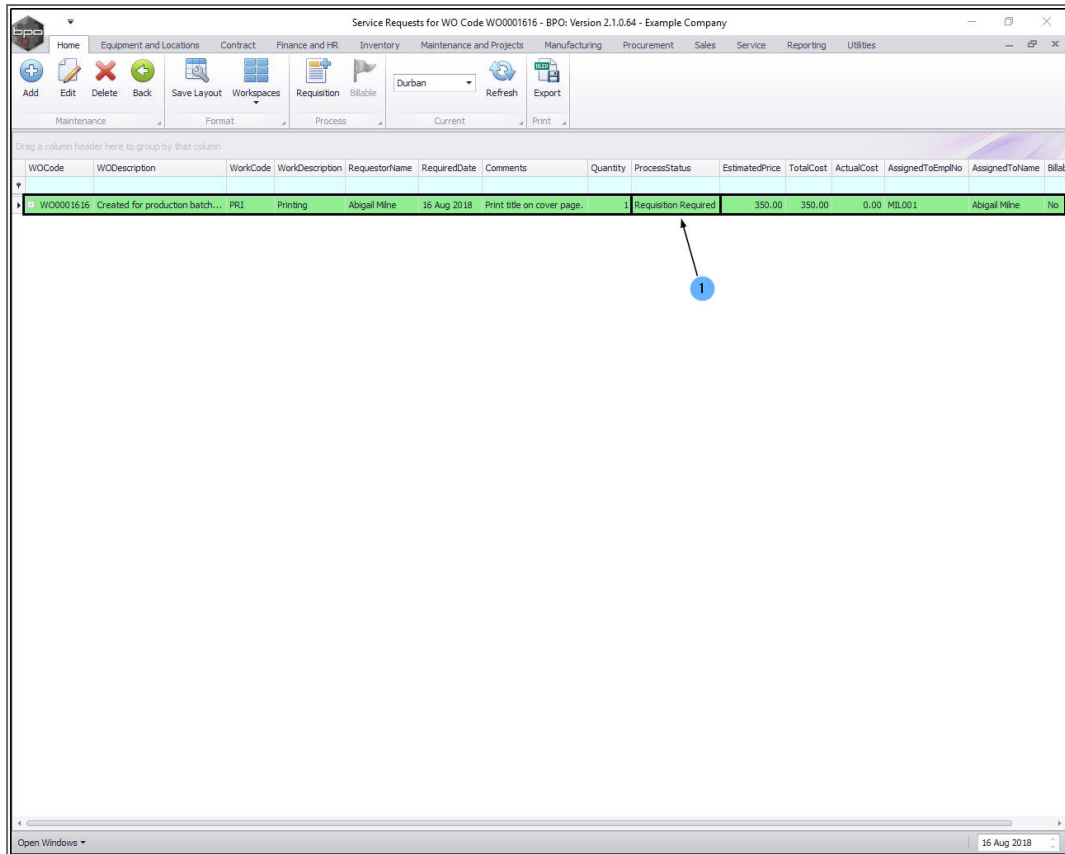
Or

IN THE **SERVICE REQUESTS** LISTING SCREEN

- Navigate to the *Service Requests* listing screen.

Ribbon Access: *Service > Service Requests*

1. *Scroll down* or
2. use the *filter row* to find the work order.

1. In this image, the *filter row* has been used to find the work order.

Here you can view the work order and the linked third party service request.

2. You will note that the **Process Status** is **Requisition Required**. You will need to create a service requisition to complete this process.

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