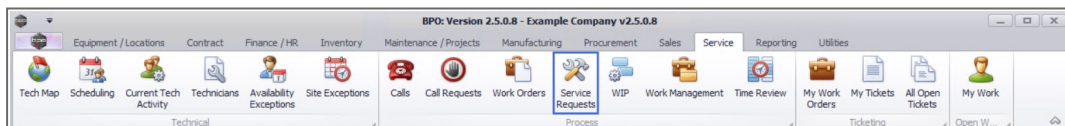# SERVICE

SERVICE REQUESTS – ADD SERVICE REQUEST

A Service Request needs to be raised when a supplier is providing a service for a work order.

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

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

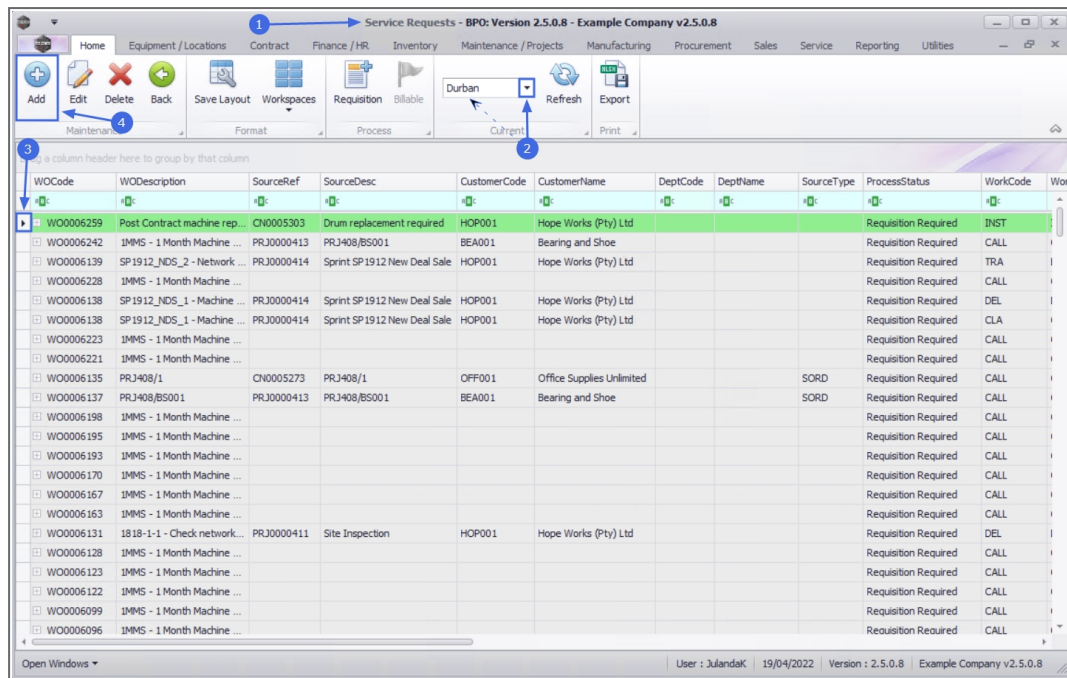A Service Request must first be raised in order to create the Service Requisition.

Ribbon Access: *Service > Service Requests*

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1. The **Service Requests** listing screen will be displayed.
2. Select the **Site** where you wish to create a service request.
   - The example has **Durban** selected.
3. Click on the **row** of the work order(s) you wish to link a service request to.
4. Click on **Add**.

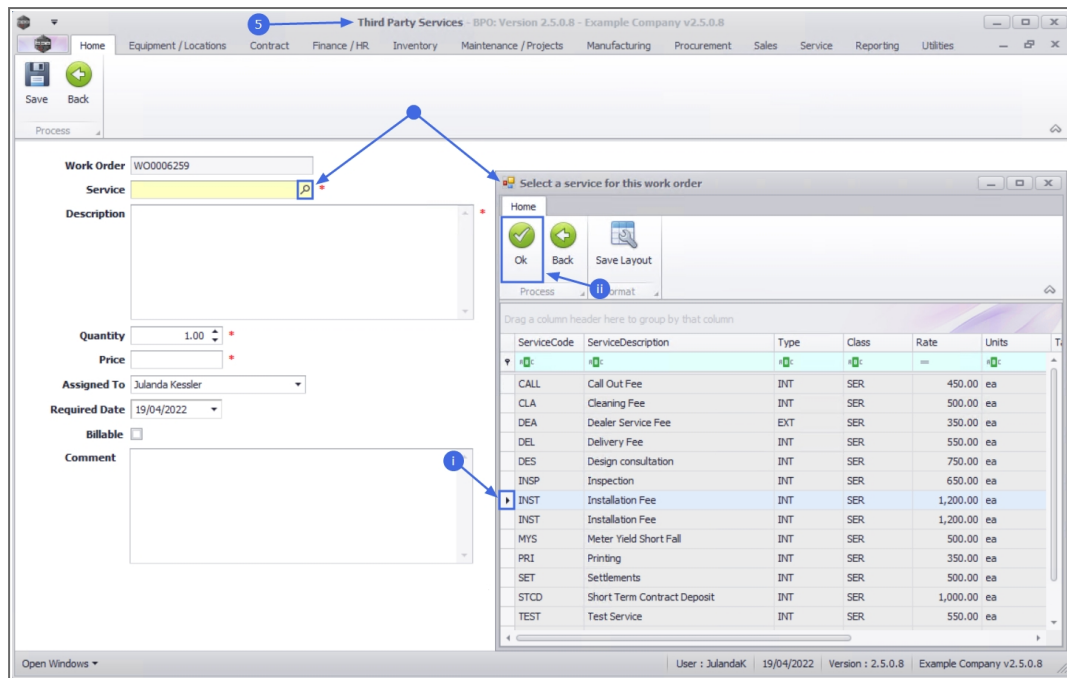Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.

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

THIRD PARTY SERVICE DETAILS

- **Work Order:** This field will populate with the work order number you have selected.
- **Service:** Click on the *search* button to display the *Select a service for this work order* screen.
    i. Click on the *row* of the service you wish to log for the work order.
    ii. Click on *OK*.

- **Description:** The service description will populate with the service you have selected.
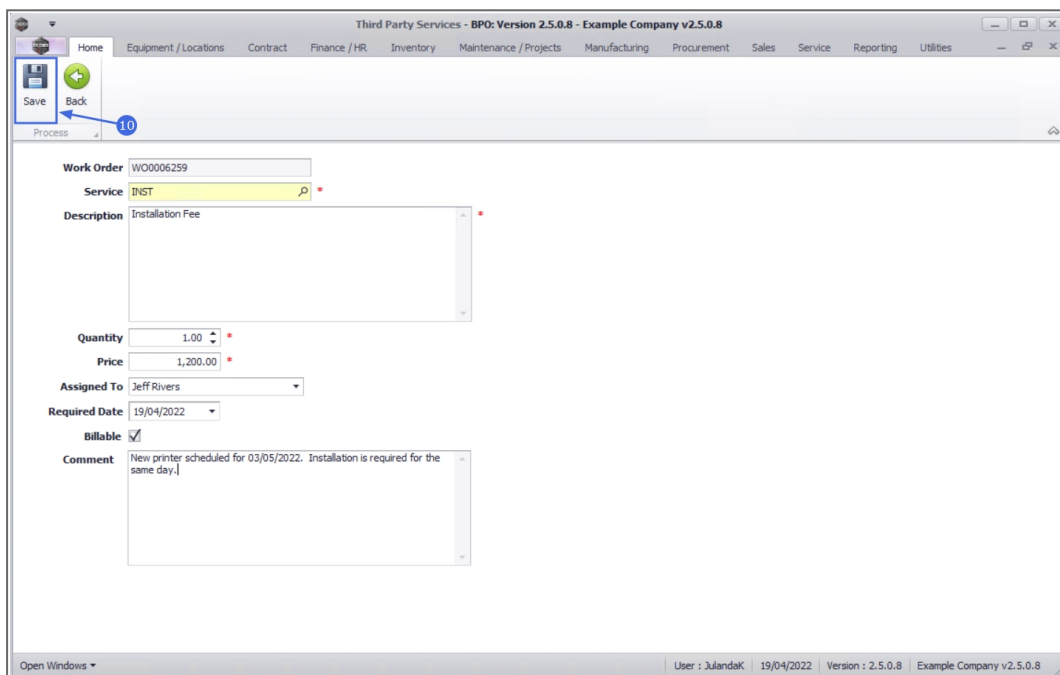
> 📝 **Note** that any additional useful information can be added to this field related to the supplier. This information will pull through to the purchase order.

- **Quantity:** Click to type in or use the *arrow* indicators to set the quantity required.
- **Price:** The price for the service will auto populate for the service selected. Click to type in an alternative price, if required.
- **Assigned To:** This field will auto populate with the name of the person logging the service. Click on the down *arrow* to select the person who is responsible for arranging the service, from the drop-down list.

- **Required Date:** The date will default to the current date. Click to type in or click on the down *arrow* to use the calendar function to change the date, if required.
- **Billable:** It is important to note whether this service request is *Billable* or not. Click on the check box if this service <u>is</u> billable.
- **Comment:** Click in the field to type in a comment related to the third party services request.
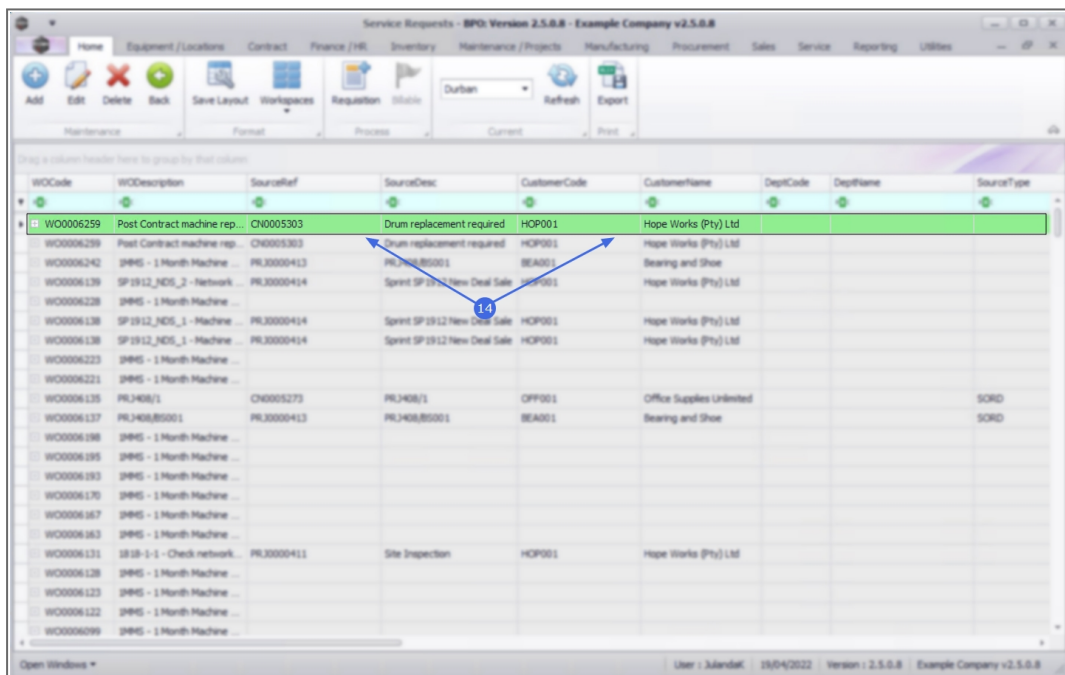
10. When you have finished adding the third party services request information, click on *Save*.

11. You will return to the *Service Requests* screen.
12. When you receive the *Service Processing* message to confirm that;
    - *Service Request on WO: [work order number] complete.*
13. Click on *OK*.
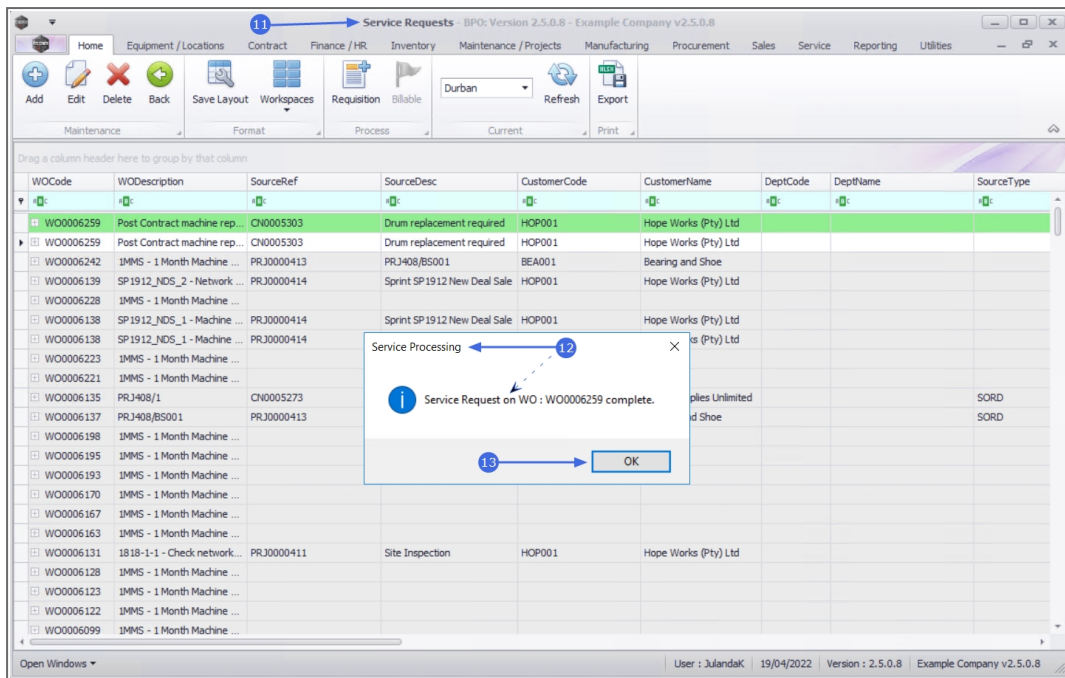
14. The service request you have added for the work order will display on the updated Service Requests screen.

MNU.052.001