

SERVICE

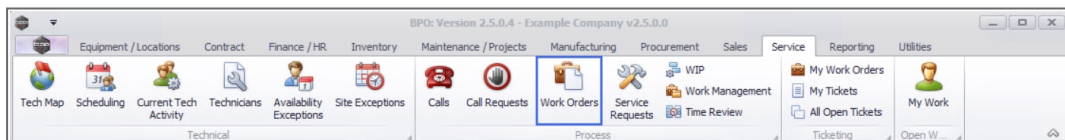
WORK ORDERS – THIRD PARTY SERVICE REQUEST

You will need to raise a service request when a supplier is providing a service for work order that needs to be done.

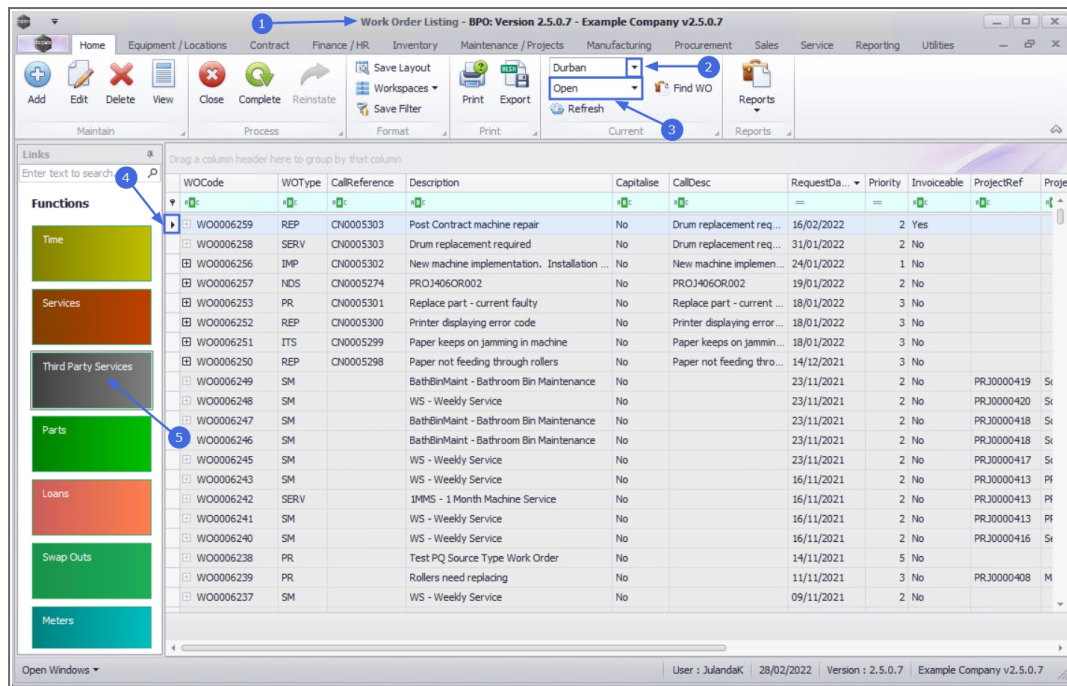
From the service request, you can start a [Non-Stock Procurement](#) cycle, i.e. Raise a Purchase Order to the Supplier or Dealer, Non-Stock Goods Received Note and Supplier Invoice.

The list of services available for selection, or that can be requested, are set up in Services.

Ribbon Access: *Service > Work Orders*



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** where the work needs to be done.
 - The example has **Durban** selected.
3. Set the **Status** to **Open**.
4. Click on the **row** of the **work order** you wish to add a contractor or third party service request for.
5. Click on the **Third Party Services** tile.



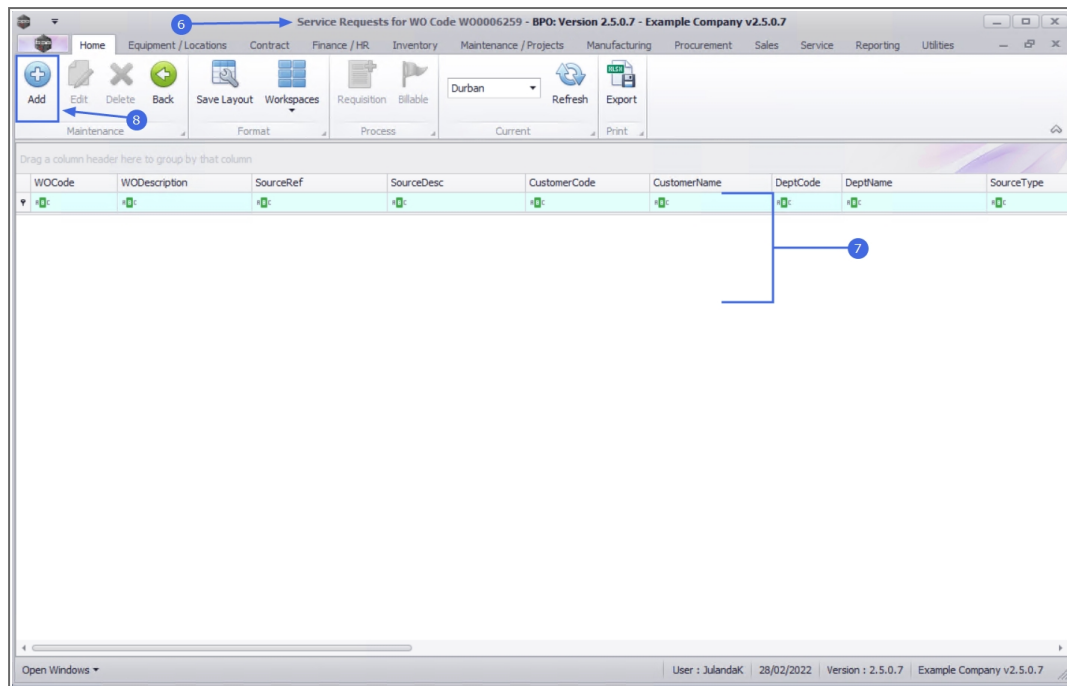
6. The **Service Requests for WO Code [WO number]** screen will be displayed.

ADD THIRD PARTY SERVICE

7. Any external service providers that have already been logged against the work order, will display in the data grid.
8. Click on **Add**.



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

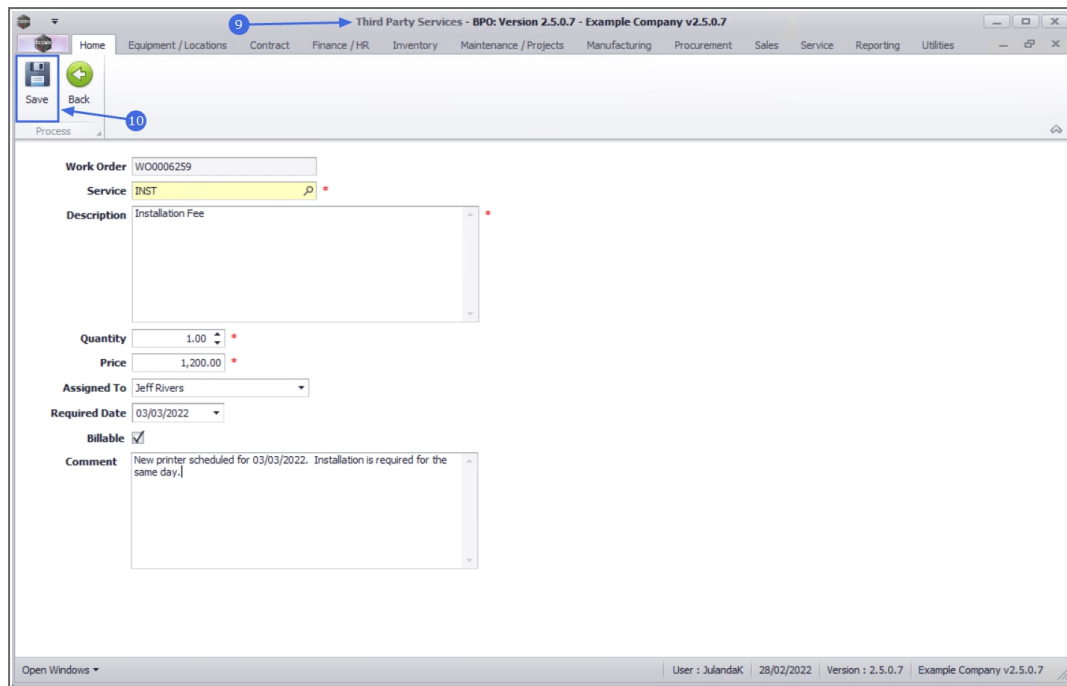


9. "The Third Party Services screen will be displayed." on page 2

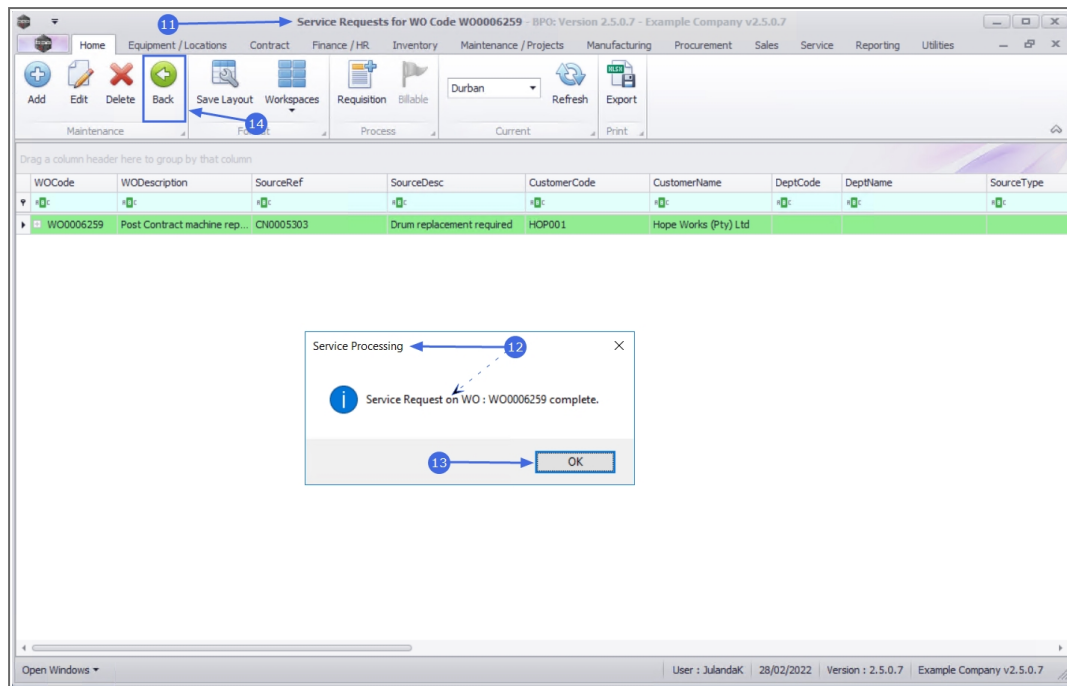


For a detailed handling of this topic refer to [Service Requests - Add Service Request](#)

10. When you have finished adding the third party services request information, click on **Save**.



11. You will return to the updated ***Service Requests for WO Code*** screen.
12. The ***Service Processing*** message will display informing you that;
 - ***Service Request on WO: [WO number] complete.***
13. Click on ***OK***.
14. Click on ***Back*** to return to the ***Work Order Listing*** screen.



EDIT THIRD PARTY SERVICE

1. From the *Service Request for WO Code [WO number]* screen,
2. Click on the **row** of the **work order** you wish to **edit**.

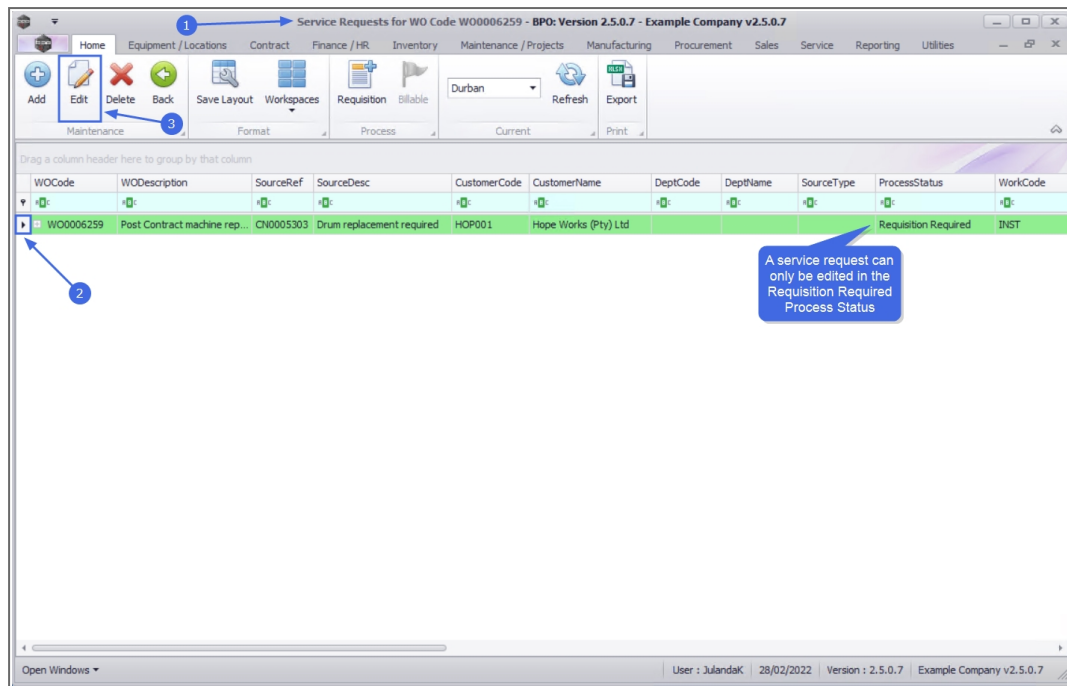


Note that a service request can only be edited in the *Requisition Required* Process Status.

3. Click on **Edit**.



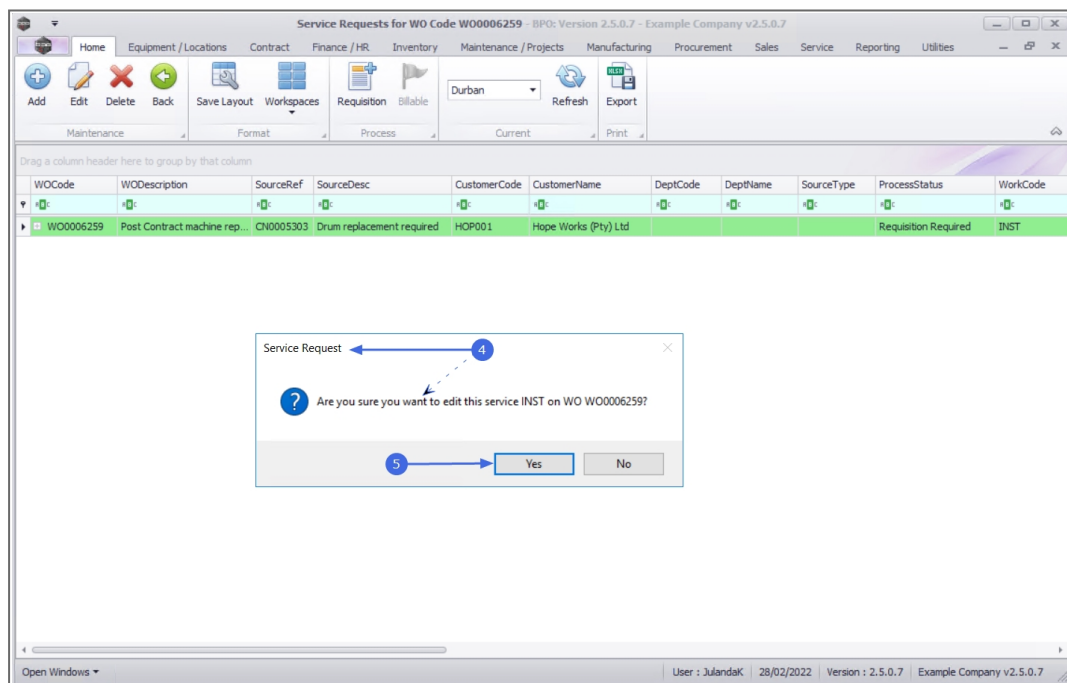
Short cut key: **Right click** to display the *Process* menu list. Click on **Edit**.



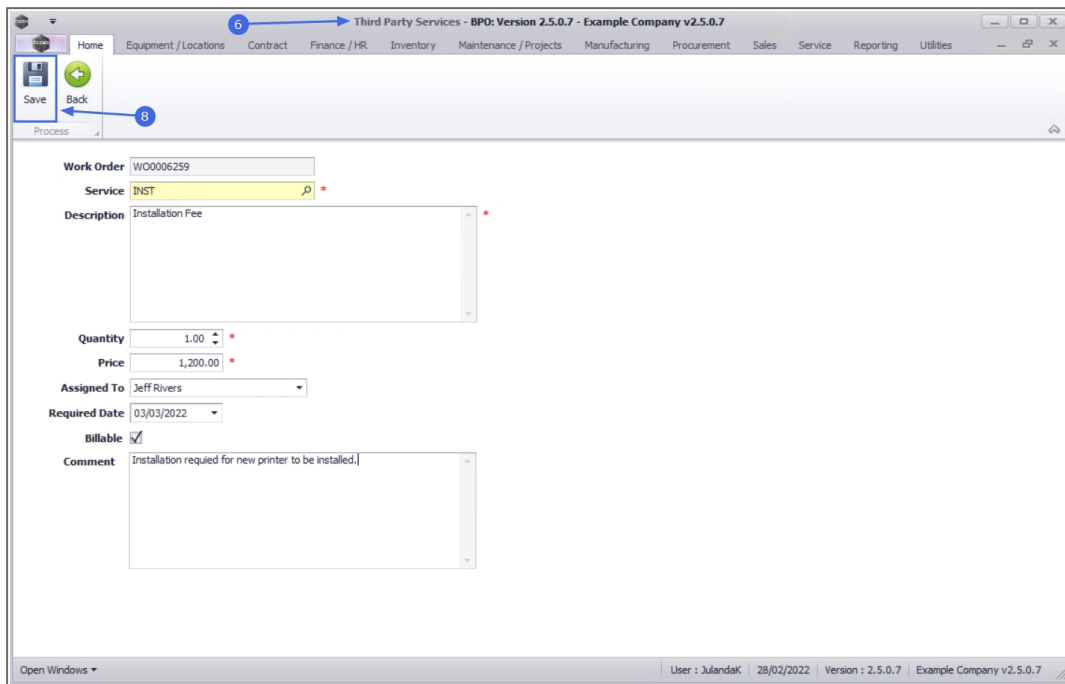
4. When you receive the **Service Request** message to confirm;

- **Are you sure you want to edit this service [service code] on WO [WO number]?**

5. Click on **Yes**.



6. The **Third Party Services** screen will be displayed.
7. Make the necessary changes to the third party service.
8. Click on **Save**.



Third Party Services - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Work Order WO0006259

Service INST

Description Installation Fee

Quantity 1.00

Price 1,200.00

Assigned To Jeff Rivers

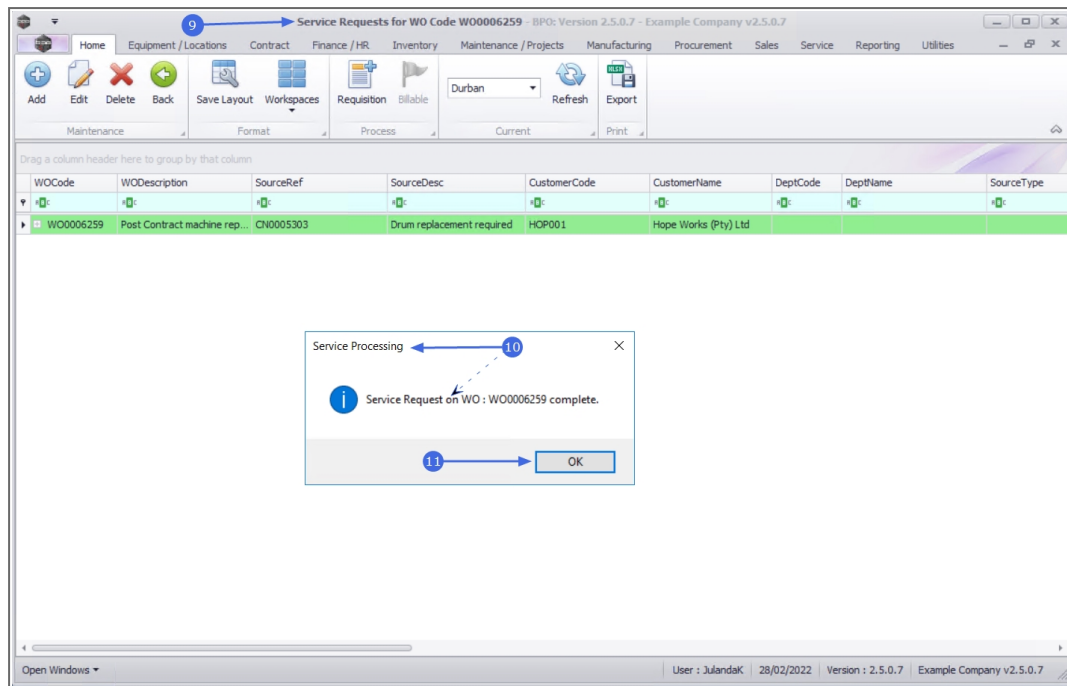
Required Date 03/03/2022

Billable ☒

Comment Installation required for new printer to be installed.

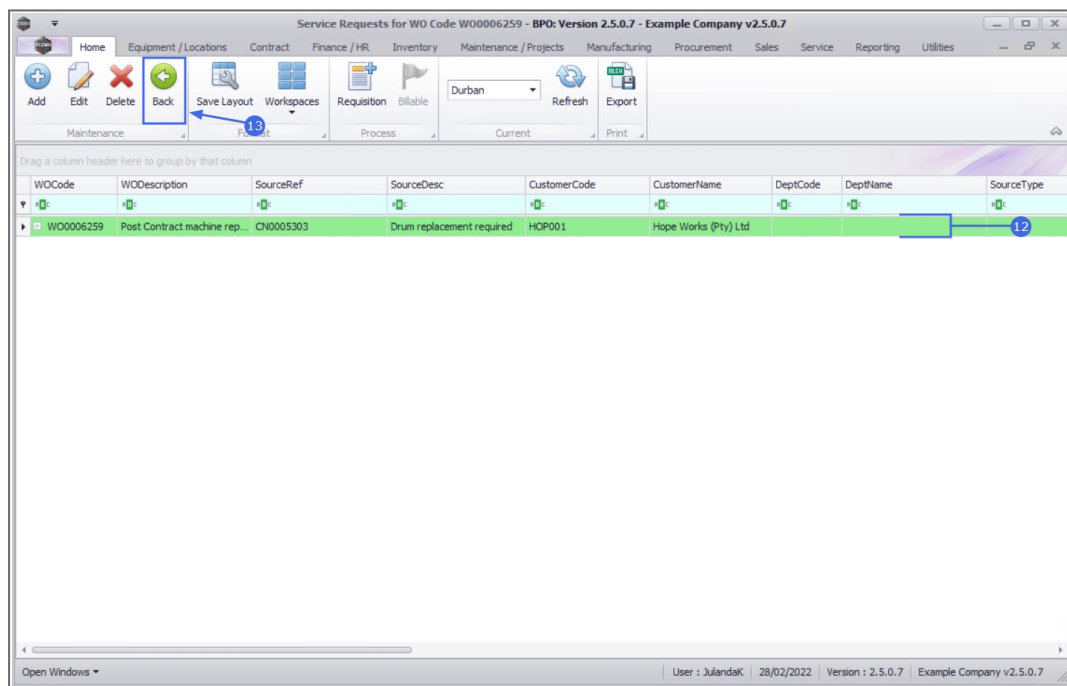
Open Windows User : JulandaK 28/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7

9. You will return to the **Service Requests for WO Code** screen.
10. When you receive the **Service Processing** message to confirm that;
 - **Service Request on WO: [WO code] complete.**
11. Click on **OK**.



12. The service request screen has been updated with the required changes you have made.

13. Click on **Back** to return to the **Work Order Listing** screen.



DELETE THIRD PARTY SERVICE

The service request can be deleted from the Service Request screen when in the requisition require process status.

If the service request has been converted to a Purchase Requisition, then the purchase requisition or purchase order, will need to be cancelled.

1. From the **Service Requests for WO Code [WO code]** screen,
2. Click on the **row** of the third party **service request** you wish to **delete**.

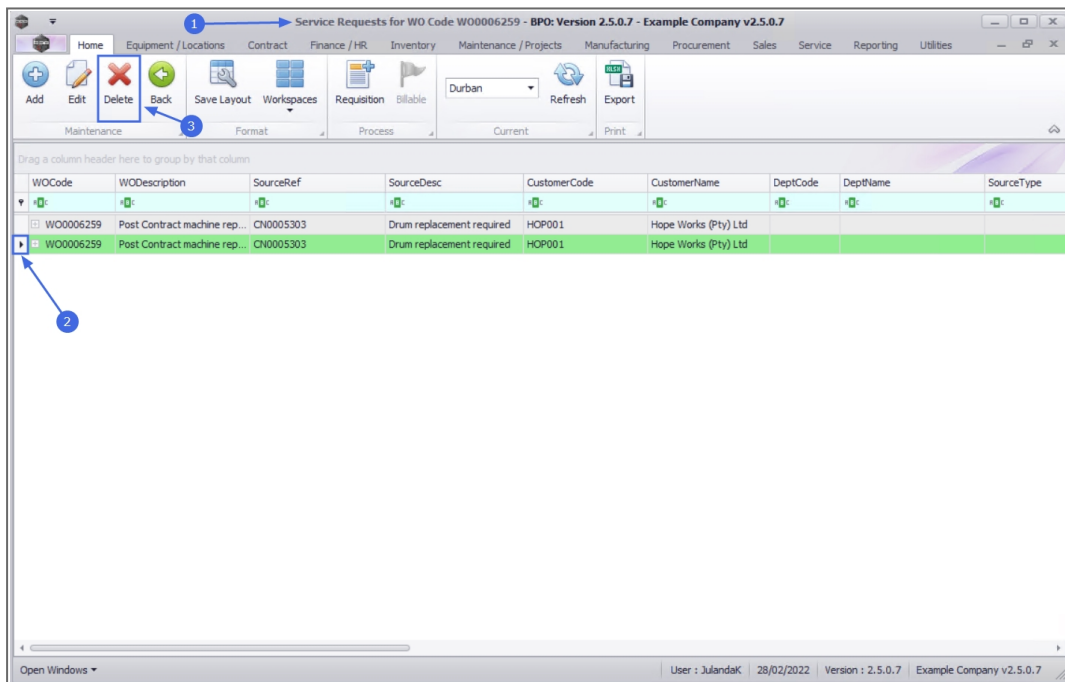


Note that a service request can only be deleted in the **Requisition Required** Process Status.

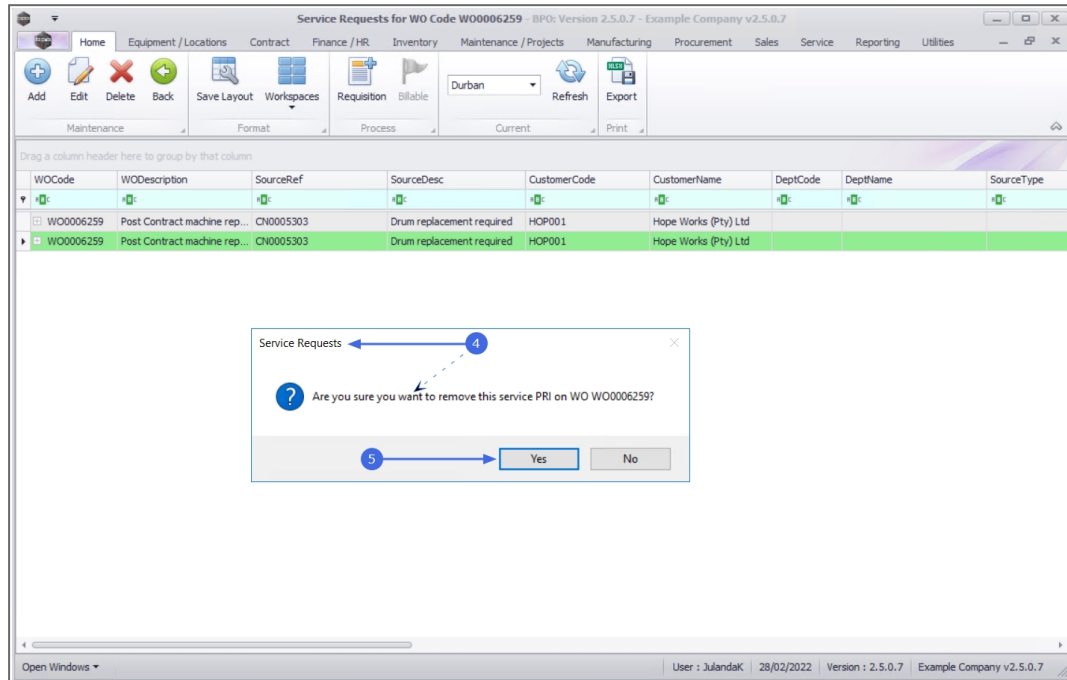
3. Click on **Delete**.



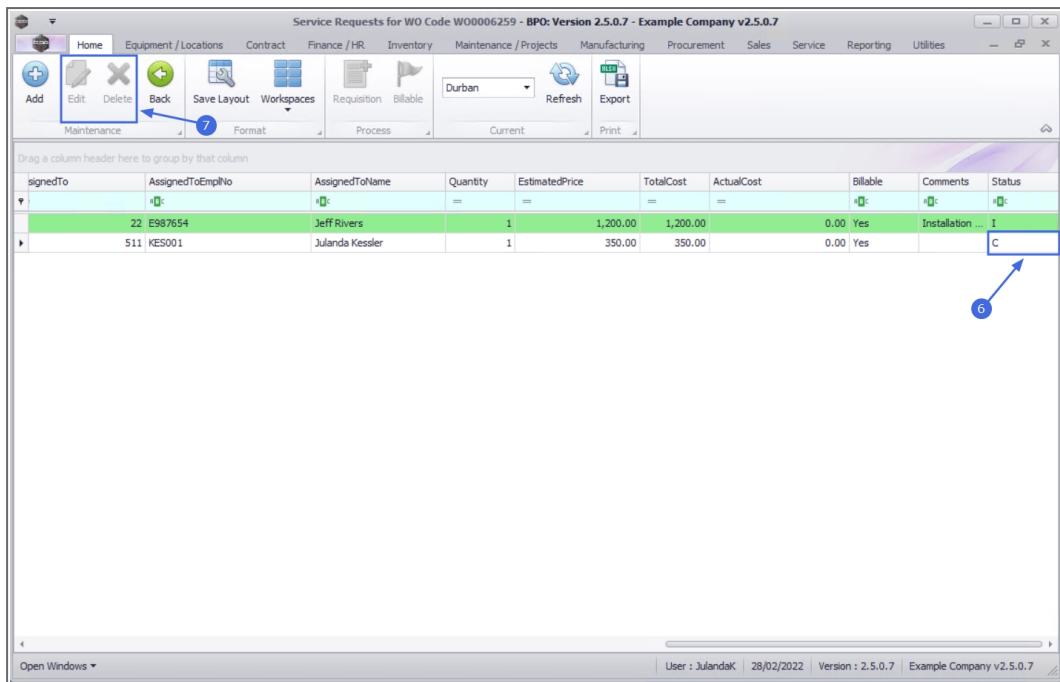
Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.



4. When you receive the **Service Requests** message to confirm;
 - **Are you sure you want to remove this service**
[service code] on WO [WO number]?
5. Click on **Yes**.

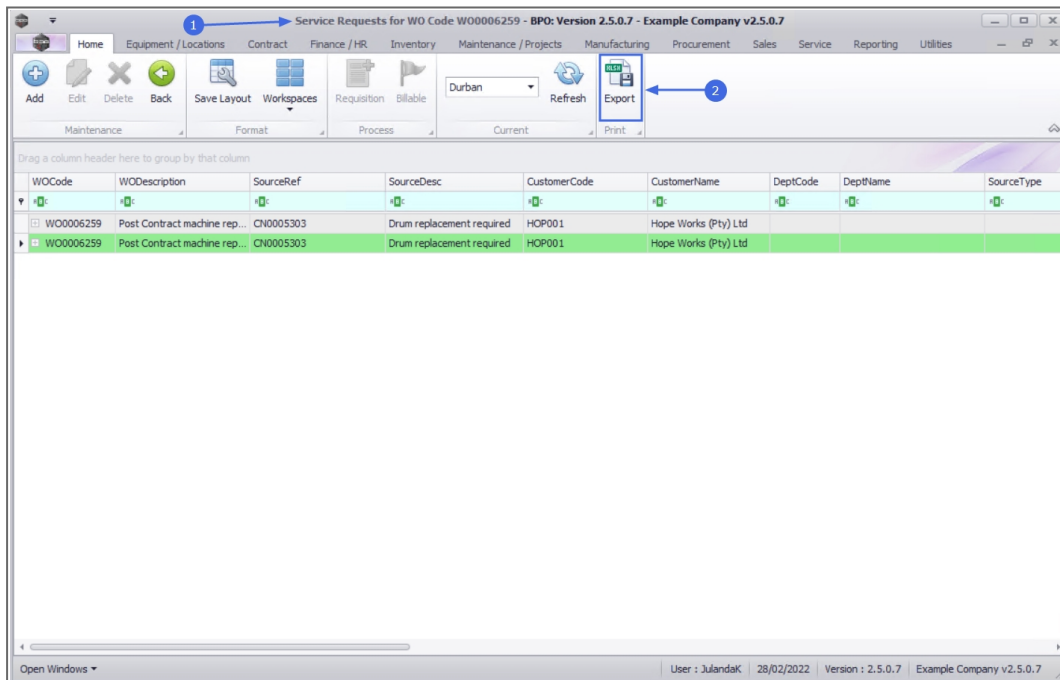


6. The service request **status** have been updated to **C (Closed)**.
7. You will no longer be able to **Edit** or **Delete** the service request.

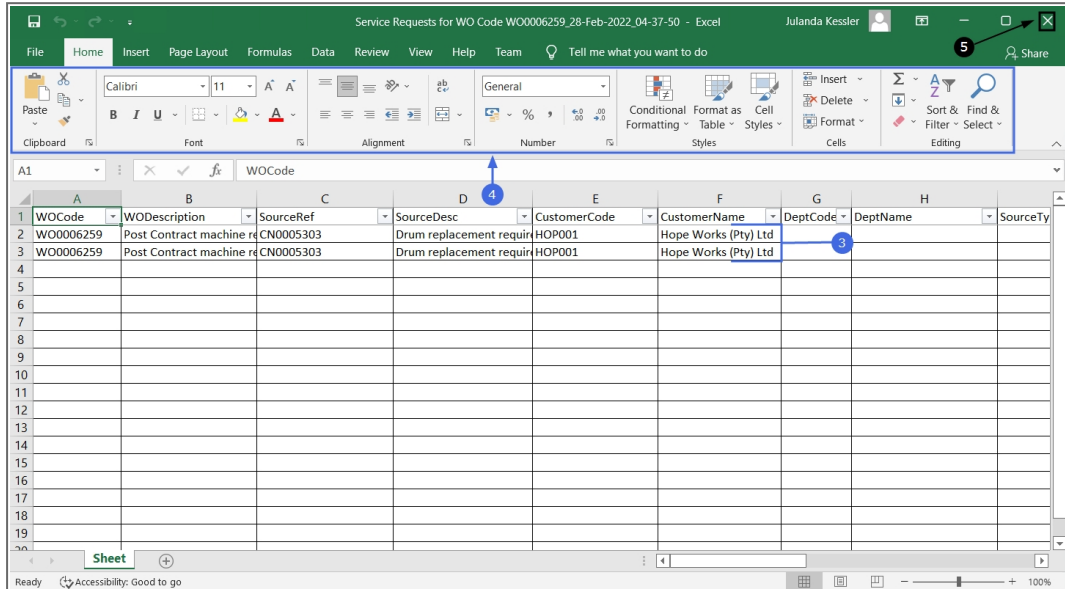


EXPORT

1. From the *Service Requests for WO Code [WO number]* screen,
2. Click on **Export**.



3. The list of service requests for the work order will be exported to an **Excel Spreadsheet**.
4. **Edit** and **Save** the document in Excel as required.
5. **Close** the spread sheet to return to BPO.



Related Topics

- [Service Requisition](#)

MNU.072.011