

SERVICE

MY WORK – ADD A THIRD PARTY SERVICE REQUEST

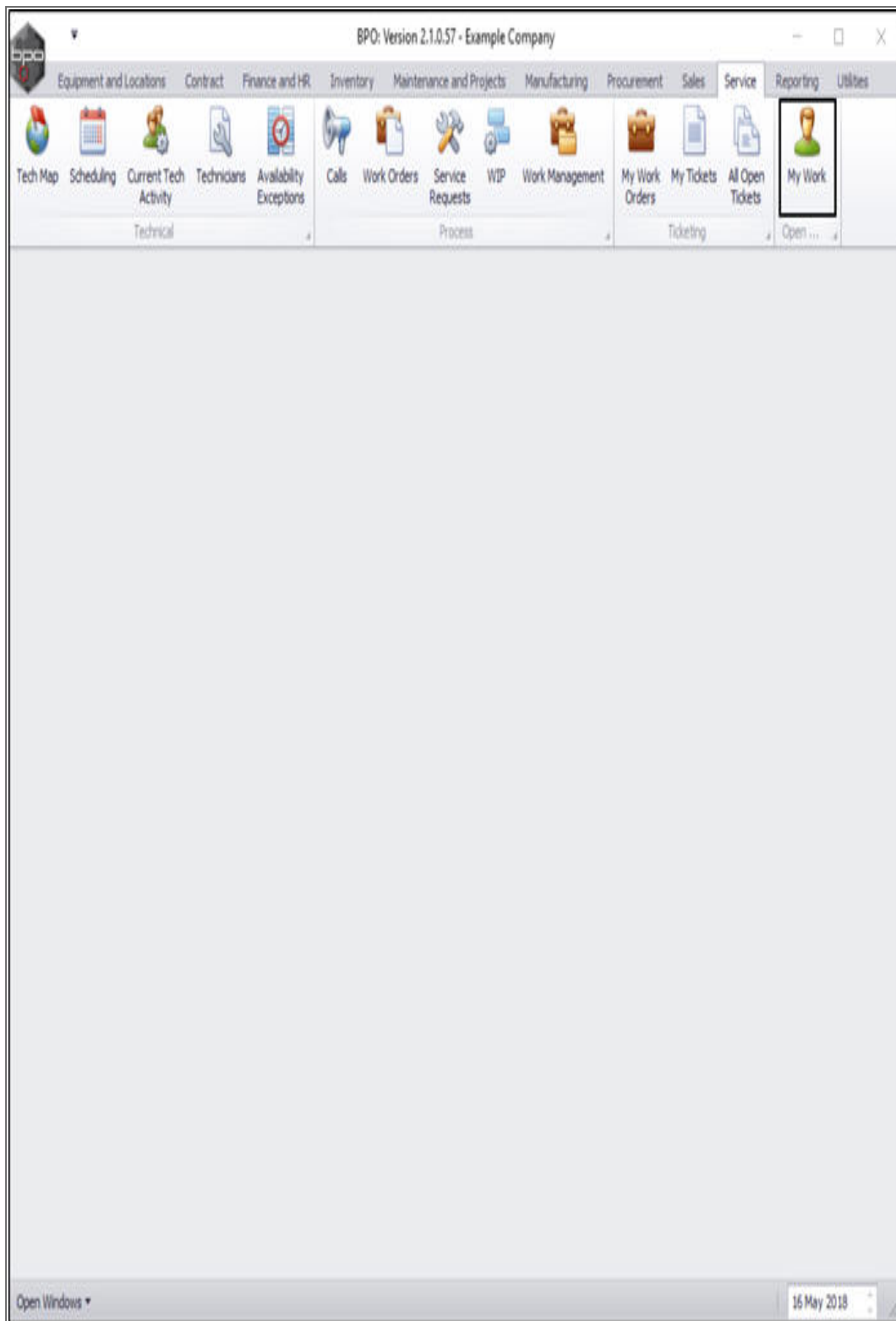
You will need to raise an **external** or **Third Party Service Request** when a supplier is required to provide a **service** for a work order.

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**.

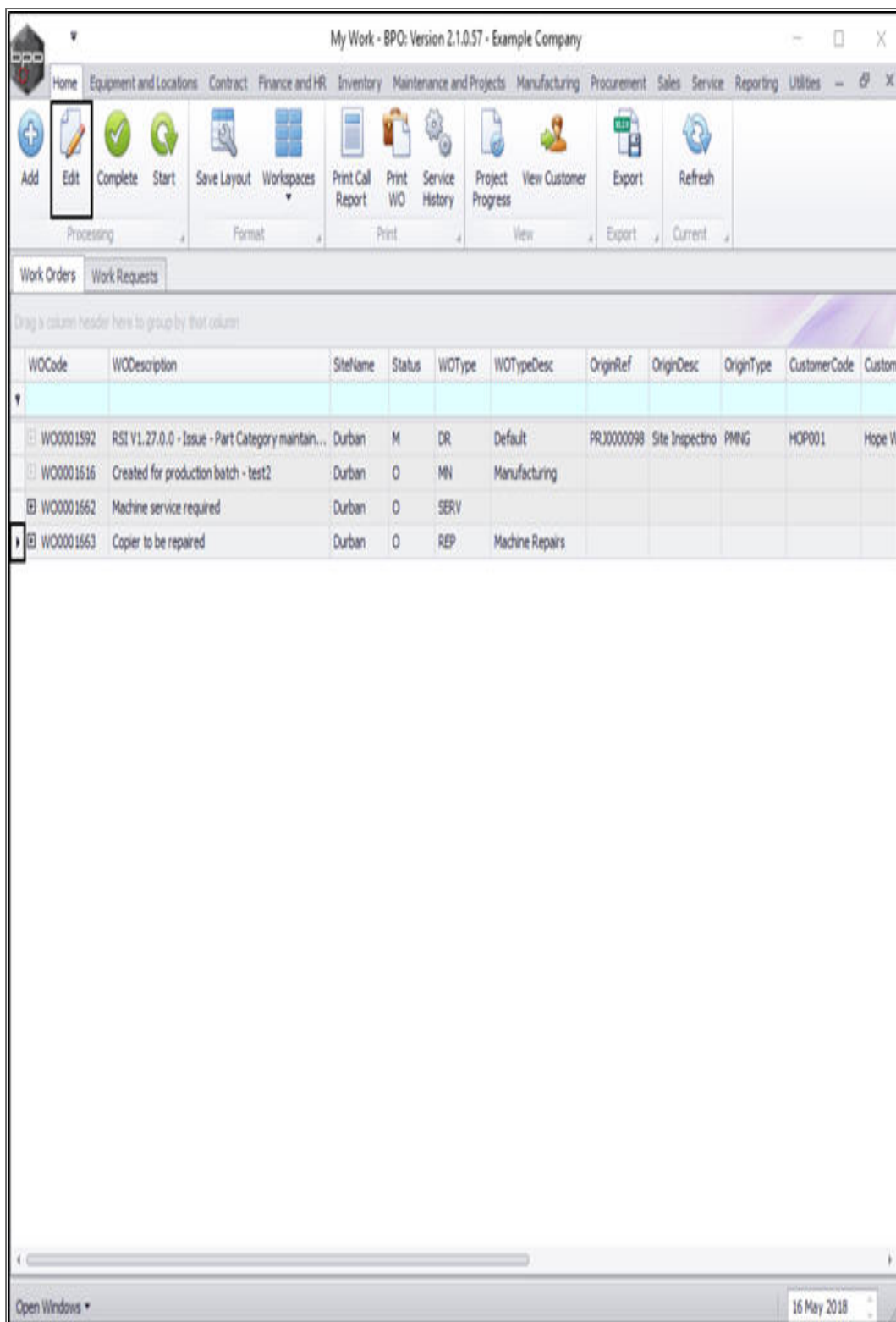
Ribbon Access: *Service > My Work*



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

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**.



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

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

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.57 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Meters

Open Windows

16 May 2018

Description Copier to be repaired

Requestor Abigail Mine

WO Type Repair

Priority 2

Request Date 15 May 2018 10:40:28

Status Open

Billable

Capitalise

Work Order Item

Functional Location Equipment

Item 19-12345

Comment

Links

RefType	ReferenceType	ReferenceNo
I CALL	Call Reference	
PMWG	Project Reference	

Schedule

Assigned To Abigail Mine

Assigned By Abigail Mine

Scheduled Start 15 May 2018 10:40:29

Scheduled End 14 Jun 2018 00:00:00

Actual Start 14 Jun 2018 00:00:00

Actual End 14 Jun 2018 00:00:00

Delay Comments Currently on Schedule

Rectification Code

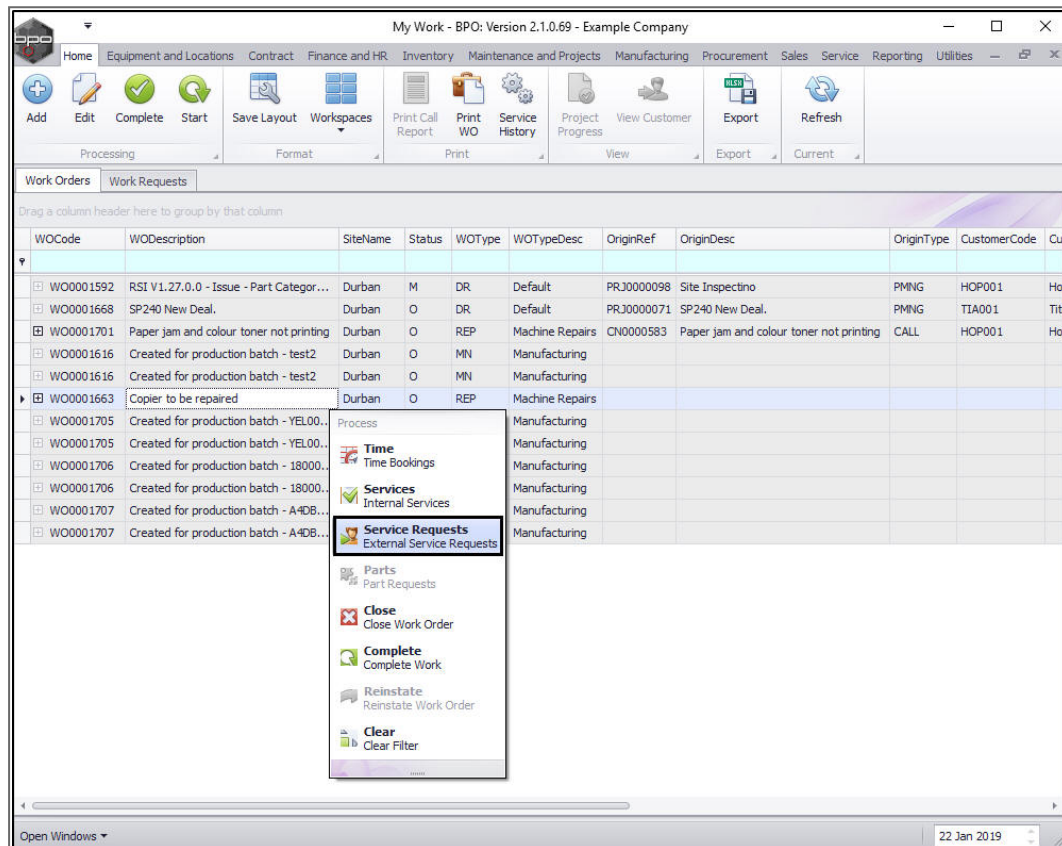
Rectification Comments

Completion Date 14 Jun 2018 00:00:00

Or

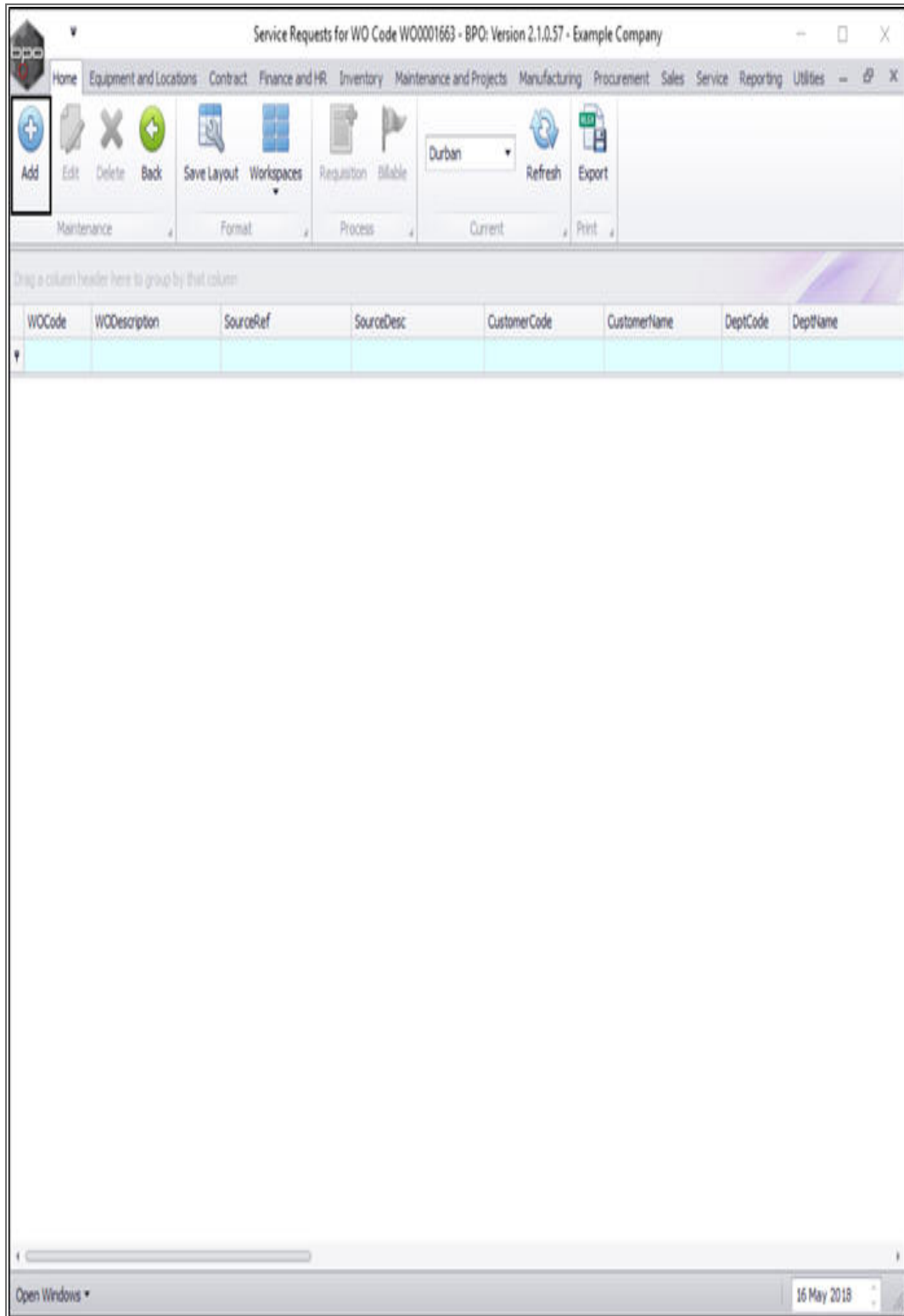
In the **My Work** listing screen,

- **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**.



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

- **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 service 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.

Third Party Services - BPO: Version 2.1.0.57 - Example Company

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

Save Back

Process

Work Order WO0001663

Service

Description

Quantity

Price

Assigned To Abigail Mine

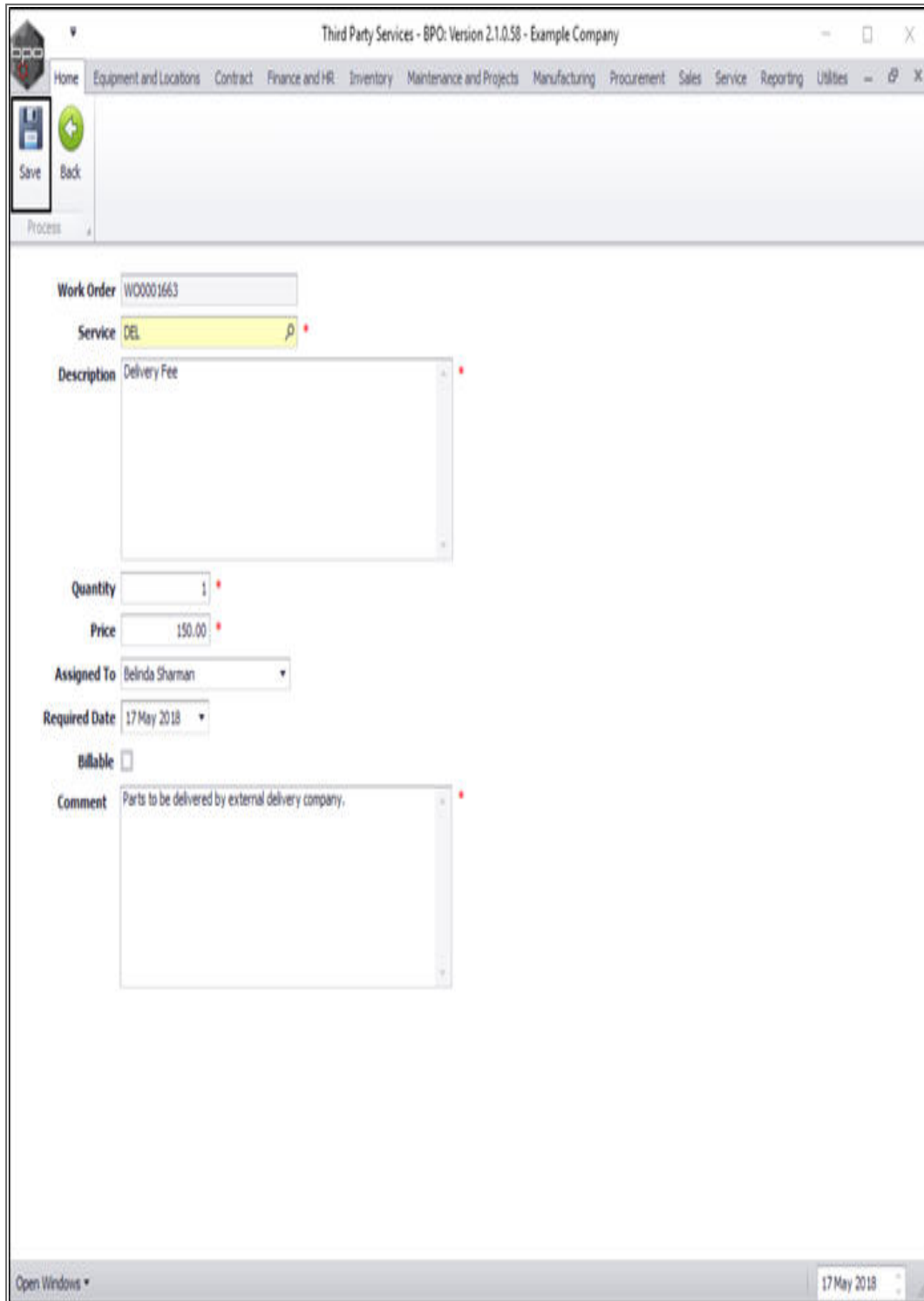
Required Date 17 May 2018

Billable ☐

Comment

Open Windows 16 May 2018

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



Third Party Services - BPO: Version 2.1.0.58 - Example Company

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

Save Back

Process

Work Order WO0001663

Service DEL

Description Delivery Fee

Quantity 1

Price 150.00

Assigned To Belinda Sharman

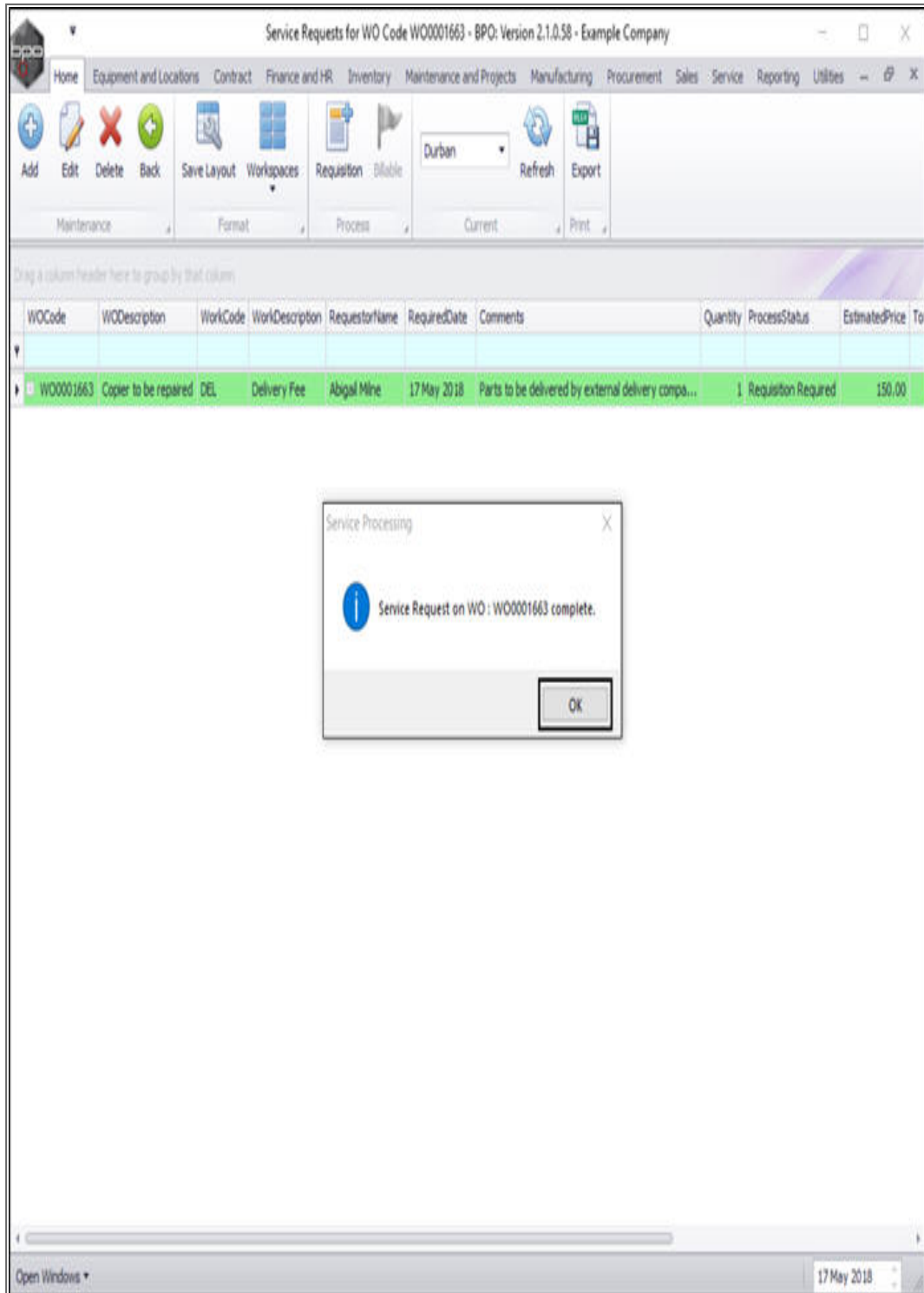
Required Date 17 May 2018

Billable ☐

Comment Parts to be delivered by external delivery company.

Open Windows 17 May 2018

- 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*.



The screenshot shows the 'Service Requests for WO Code WO0001663 - BPO: Version 2.1.0.58 - Example Company' window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Workspaces, Requisition, Billable, a location dropdown (Durban), Refresh, and Export. A secondary toolbar contains Maintenance, Format, Process, Current, and Print buttons. The main area displays a table of service requests with columns: WOCODE, WODescription, WorkCode, WorkDescription, RequestorName, RequiredDate, Comments, Quantity, ProcessStatus, EstimatedPrice, and Total. One request is visible: WO0001663, Copier to be repaired, DEL, Delivery Fee, Abigail Mine, 17 May 2018, Parts to be delivered by external delivery compa..., 1, Requisition Required, 150.00. A 'Service Processing' dialog box is open in the center, displaying an information icon and the message 'Service Request on WO : WO0001663 complete.' with an OK button.

WOCODE	WODescription	WorkCode	WorkDescription	RequestorName	RequiredDate	Comments	Quantity	ProcessStatus	EstimatedPrice	Total
WO0001663	Copier to be repaired	DEL	Delivery Fee	Abigail Mine	17 May 2018	Parts to be delivered by external delivery compa...	1	Requisition Required	150.00	

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

WOCODE	WODESCRIPTION	WORKCODE	WORKDESCRIPTION	REQUESTORNAME	REQUIREDDATE	COMMENTS	QUANTITY	PROCESSSTATUS	ESTIMATEDPRICE
WO0001663	Copier to be repaired	DEL	Delivery Fee	Abigail Milne	17 May 2018	Parts to be delivered by external delivery company.	1	Requisition Required	150.00



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