

#331435 Trying to order parts on SC267223 but it is automatically trying to pick from 22A and not 21A

Submitted 1 March 2022 at 08:12 **Received via** Web Form **Requester** Chantelle Fasen <chantelle.fasen@terracat.co.nz>

CCs
Maureen Aberilla <maureen.aberilla@terracat.co.nz>, Sue Petersen <sue.petersen@terracat.co.nz>

Status Solved **Type** Problem **Priority** Normal **Group** Service Desk **Assignee** Jess Beattie

Category
NAXT

Jess Beattie March 1, 2022 at 08:12
Service call was opened by Fraser for 22A but then he changed it to 21A however it hasn't properly changed

Service segments (1 - ggnz) - Segment id: SC267223-01, In-process, Call number: SC267223

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type
SC267223-01		<input checked="" type="checkbox"/>	<input type="checkbox"/>			520	1000	Overhaul - Top End - Engine	TE	Shop	In-process	Passed	PTM02165		3018985	
SC267223-02		<input checked="" type="checkbox"/>	<input type="checkbox"/>			040	1052	Inspect - Turbocharger		Shop	In-process	Passed	PTM02165		3018985	

Segment details

Segment id: SC267223-01

Description: Overhaul - Top End - Engine

Status: In-process

Scheduler status: Passed

Credit status: CCT02412499

Business area: AR Revenue

Equipment: EQ011217

Serial number: PTM02165

Customer equipment number: Century No 3

Make: CATERPILLAR

Model: 3512B

Arrangement number: 2120324

Invoice account: 3018985

Name: Century Drilling & Energy

Follow-up note:

Project

Project ID: SC267223-01

Cust price group: REVENUE

Customer category group:

Job details

Standard job:

Estimated duration: 260:00

Target duration: 260:00

Version: 0

Service letter:

Job code: 520

Component: 1000

Qty code:

Modifier code: TE

Shop/Field: Shop

Cab type:

Business group:

Payment territory:

Structure related:

SMU

SMU: 14,381.00

Unit: Hours

Related equipment

Related serial number:

Deductible

Deductible:

Customer account:

Deductible amount: 0.00

Deductible entry code:

Sales

Sales order: 2250031707

Part price group:

Warehouse: 22A

Tool sales order:

Tools warehouse: 21A

Store:

Division: ESV

Travel and Mileage

Travel:

Travel customer:

Mileage:

Mileage customer:

Currency conversion

Currency: NZD

The sales order is showing 21A but the parts have been ordered from 22A

Sales order (1 - ggnz) - Sales order: 2250031707, Century Drilling & Energy, Sales order: 2250031707

File Sales order Sell Manage Pick and pack Invoice General Interfaces Inquiries

Service order Direct delivery Delete Cancel Edit Header view Line view From all From journal Totals Order class filter Ordering configuration Cost/revenue to be allocated Backorder review Download online orders Generate from template Attachments Send payment failure email

Sales order Purchase order Create case line New Maintain Show Copy View Add Backorder Commerce S... Attachments Email notification

The selected address is no longer effective.

2250031707 : 3018985 - Century Drilling & Energy

Name: Century Drilling & Energy
Customer requisition:
Customer reference:
Contact ID:
Contact:
Telephone:
Invoice account: 3018985
Name: Century Drilling & Energy

Requested ship date: 12/01/2022
Requested receipt date: 12/01/2022
Confirmed ship date:
Confirmed receipt date:
Need by date: 31/01/2022

Equipment
Make: CATERPILLAR
Model: 3512B
Serial number: PTM02165
Equipment: EQ011217
Customer equipment number: Century No 3
Transmission arrangement number:

Disable auto replacement:
Sales responsible: Fraser Griffiths
Warehouse: 21A
RMA number:
Pool:
Part price group:
SOS: 000
Order class: SERVICE
Parts invoice method: Default

Delivery address
Name: Century Drilling & Energy Serv
Delivery address: Terra CAT
Address: 67 De Havilland Drive
Bell Block
New Plymouth 4312

Mode of delivery:
Delivery reason:
Delivery terms:
Delivery location:

Status
Status: Open order
Document status: None
Credit status:
Credit check transaction:

Abnormal call
Abnormal call:

References
Customer requisition:
Customer reference:
Division: ESV
Government Order:

Delivery contact:

Sales order lines

Warehouse	Location	SOS	Product name	Item number	Quantity	Ship Qty	Delivery remainder	Invoice remainder	Replacement	Warning	Existing Quote	Unit price	Discount	Discount percent	Adjusted unit price	Ne
22A	A02E07D	000	O-Ring	0336031	3.00	3.00	3.00					42.06		10.00	0.00000	
22A	NO-LOC	000	Core Gp Oil	0R5519	1.00		1.00					5,322.29		10.00	0.00000	
CC		000	Core Gp Oil- Core Ch	0R5519CC	1.00		1.00					1,921.55			0.00000	
22A			Melbourne DC	AIRAUSMLB3	1.00		1.00					203.60			0.00000	

Line details

Default financial dimensions - Revenue and Consumption

Contract: No default
CostCentre: 1061 EQU - Parts Counter
Department: EPT Part Sales
Division: EPT Parts Sales
Equipment: EQ011217
Location: 22 New Plymouth
ProductGroup: PTS000 Caterpillar Parts
ProductionID: No default
ProjectID: SC267223-01 Overhaul - Top End - Engine
SalesPerson: NA Not Applicable

Select the default dimension value

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Jess Beattie March 1, 2022 at 08:14

Internal note

[Maureen Aberilla](#) [Sue Petersen](#) Morning ladies, this looks to be another messy problem. How can we fix this so that they can order parts from 21A on the service call?

Jess Beattie March 1, 2022 at 09:18

Internal note

SC in process status - the warehouse cannot be changed.
Can be changed when segment is in created status
Sue talked to Nathan and he said he has talked to Tess about this..
They need to create a new segment/copy segment then change the warehouse before putting in process (use the copy a segment button then cancel the previous segment)

Sue Petersen March 1, 2022 at 09:18

Internal note

Hi Jess,

As per our conversation once the service call is in process you are not able to change the warehouse. They can copy the segment to a new one and then change the warehouse while it is in created status and then they can delete the old segment. Thanks

Sue Petersen
Business Analyst - Terra Cat
24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441
M: +64274870656 |



From: Jess Beattie (IT Service Desk) <itsd@terracat.co.nz>

Sent: Tuesday, 1 March 2022 8:14 am

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; Maureen Aberilla <Maureen.Aberilla@terracat.co.nz>

Subject: Trying to order parts on SC267223 but it is automatically trying to pick from 22A and not 21A

You are a follower on this request (331435). Reply to this email to add an internal note to the request.

Jess Beattie (ITSD - Terra Cat)

1 Mar 2022, 08:14 GMT+13

Private note

[Maureen Aberilla](#) [Sue Petersen](#) Morning ladies, this looks to be another messy problem. How can we fix this so that they can order parts from 21A on the service call?

Jess Beattie (ITSD - Terra Cat)

1 Mar 2022, 08:12 GMT+13

Service call was opened by Fraser for 22A but then he changed it to 21A however it hasn't properly changed

The sales order is showing 21A but the parts have been ordered from 22A

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat

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Ticket # 331435

Status Pending
Requester Chantelle Fasen
CCs -
Followers Maureen Aberilla, Sue Petersen
Group Service Desk
Assignee Jess Beattie
Priority Normal
Type Problem
Channel Web Form

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[49V7DV-7D07]Ticket-Id:331435Account-Subdomain:itsdterracat

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Jess Beattie March 1, 2022 at 09:24

Hey Chantelle,
Sue has looked into this for us and the resolution is:

Once a service call is in "process" status, the warehouse cannot be changed. If it was in "created" status then you would be able to change it.
What you need to do is:

- 1. Select the segment
- 2. Go to the "manage" tab at the top
- 3. Click the "segment copy" button as per screenshot below
- 4. While the segment is in "created status", change the warehouse to 21A before putting the segment to "in process" status
- 5. Cancel the old segment

Service segments (1 - ggn2) - Segment id: SC267223-01, In-process, Call number: SC267223

File

Service segments

Manage

Warranty

Parts and Labour

Related information

Segment copy

Service segment split

Flat rate

Get flat rate price

Flat rate

Service reports

Change segment customer

Equipment change

Update

Update SMU

Change structure relation

View/Change Cost Center/...

Add segment notes

Add correction text

Reprice segment

Hour meter replacement

Apply Contract

Remove contract

Apply Service Letter

Cancel service letter

Create follow up notes

Open follow up notes

Apply follow-up note

Check credit limit

Permanent notes

Service scheduler

Scheduler

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty t
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SC267223-02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			040	1052	Inspect - Turbocharger		Shop	In-process	Passed	PTM02165		3018985	
SC267223-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			520	1000	Overhaul - Top End - Engine	TE	Shop	In-process	Passed	PTM02165		3018985	

Segment details

Items

Hours

Misc. Items

Misc. Costs

Kind regards,
Jess Beattie

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