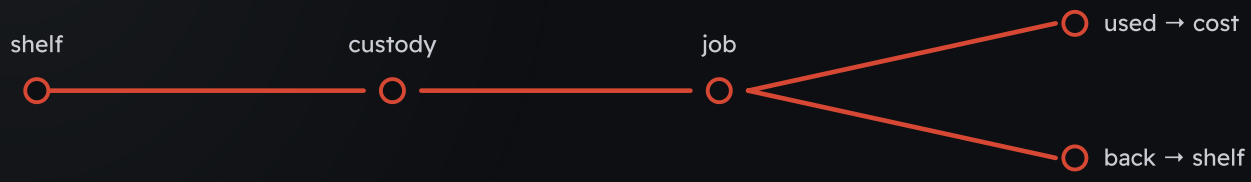
SIMPLE GUIDE · FOR ENGINEERS AND EVERY EMPLOYEE

The engineer’s spare parts
Five steps, in plain words

A spare part the store gives an engineer is still the company’s. It stays in his custody. It is charged only when he uses it on the job; what he does not use goes back to the shelf.



1 Engineer

Asks for the part from the job

He opens the job and, in the Parts tab, asks for the part he expects to need. No part leaves the store without a job number.

2 Service manager

Approves

One signature. He chooses the item and the store it comes from.

3 Store

Issues it into the engineer’s custody

From Stock requests → Service spare parts. The part moves from the shelf into the engineer’s custody. Nothing is charged yet.

4 Engineer

Ticks each part at the close

Used, Not used, or Some used. The job cannot close until every part of it is ticked.

5 Store

Takes back what was not used

Checks its condition and puts it back on the shelf. Nothing is left in his custody.

01

At the close of the job

The engineer closes the job as always. First he ticks every part of that job in his custody:

Used

Out of his custody, its cost goes to the job: to the contract if the machine is under contract or warranty, or to a line Finance bills to the customer.

Not used

Marked “going back”. The store receives it, checks it and shelves it.

Some used

Two issued, one used: write 1. One is used, the other goes back.

Issued to his custody
no cost yet

Used
cost to the job

Back to the shelf
no cost

When something goes wrong

Only the service manager decides, and writes the reason. An engineer cannot write a part off himself.

Lost

Written off with a reason.

Damaged

Written off, or received back with its condition noted.

Used on another job

Moved to that job by its number and settled there.

The reminder: three days after a job closed, any part still in his custody — or marked going back and not yet received by the store — sends a reminder every morning to the engineer and the service manager, until it is settled.

02

When the store does not have the part

The request is not lost. It stays open as a line in Parts to order until the engineer has the part — even after the job closed.

1. **Engineer asks**
   The store has none: the request becomes a line in Parts to order.
2. **Call centre**
   Follows it: To order → Ordered. The service manager raises the purchase request from the line.
3. **Store receives**
   The goods receipt marks the line Arrived by itself; the engineer is told.
4. **Sent to the engineer**
   One button issues it into his custody, against the same job or a follow-up job.

Where each person finds it

Engineer	Service → the job → Parts tab · My space → My spare parts
Service manager	Service → Engineers' spare parts: by engineer, open lines, to bill, written off
Store	Stores → Stock requests → Service spare parts (issue) · Stock → Engineers' spare parts (take back, ageing)
Call centre	Parts to order, and a tile on the call desk
Finance	The used cost on the job · "With engineers" in the stock report

Finance: nothing new to sign. No voucher when a part is issued or comes back — the books move only when a part is used.

03

Questions people ask

? Does issuing a part charge the job?

No. Only a part ticked Used is charged.

? Can I close the job and settle later?

No. Tick every part first; the store can take a return back later.

? What if I keep a part after the job closed?

After three days you and the service manager get a reminder every morning until it is settled.

? Can I write a part off myself?

No. Tell the service manager; he records it with a reason.

? Can another office’s store give me parts?

No. The parts in your custody belong to your own office’s store.

? Does a part in my custody make an invoice?

No. Only parts used on a job the customer pays for go to Finance to bill.

> **Remember: a part in the engineer’s custody is still ours. It costs the job only when it is used.**