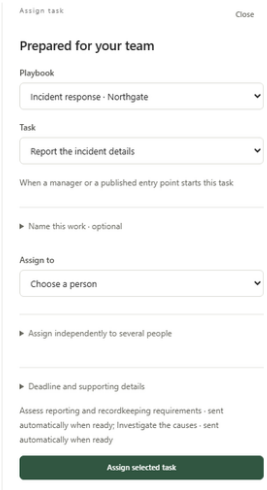
GET A PART OR SERVICE APPROVED AND RECEIVED

Make parts approvals clear about spending responsibility

Review the request against spending rules and the approver's scope. Record the limit check, decision and purchase reference, and route a request beyond that scope to the person authorized to decide.

Request the part or service > Approve within the spending rules > Receive and accept (when triggered)

SkillSmith · Choose prepared work and its recipient — incident-response example



SkillSmith · Carry the earlier incident response into the investigation



SkillSmith · Keep the next disposition decision with its responsible reviewer



Choose prepared work and its recipient - incident-response example



Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon KEYSIGHT TECHNOLOGIES AMERICAN EAGLE Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Designated specialist	Request the part or service; Receive and accept	Respond with condition, estimated cost, item and linked work order or asset.
Team lead	Approve within the spending rules	Respond with po or vendor reference, approved / declined and limit check.

Send the decision to the authorized approver

In a worked example, the requested part is needed but the purchase exceeds the assignee's approval scope; route the decision to the authorized person.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Request form and Policy	Open the selected material for this occurrence.
Recorded response	approved / declined, PO or vendor reference and limit check	Save the response with its work context.
Review point	PO or vendor reference and limit check	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Get a part or service approved and received

Bring request form and policy into the prepared work. Designated specialist and Team lead each receive the context needed for their part.

01 Request the part or service

Record item, quantity, linked work order or asset, estimated cost and urgency.

02 Approve within the spending rules

Record approved / declined, PO or vendor reference and limit check.

03 Receive and accept

When approved, record received quantity, condition, photo and partial or complete.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Get a part or service approved and received

A needed part or outside service is requested with the work it belongs to, approved within spending rules, and its receipt is confirmed - so work orders do not stall silently. A declined request closes as declined; a partial receipt keeps the remainder open.

Spare parts · Maintenance

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Request form The task uses this material	The parts or service request form.
Policy The task uses this material	Spending limits, approvers and acceptance rules.
Reward catalog The task uses this material	The asset the part is for.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose request form and policy from the resources your team uses.

02 Agree the responsibilities

Confirm designated specialist and team lead for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Walk through these conditional steps: “Receive and accept”.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains approved / declined, po or vendor reference and limit check. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring request form and policy. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do the conditional steps become part of the method?

The conditional route is used when approved. Select the variant or respond to the recorded condition before treating that step as required.

What is the outcome for the wider workflow?

Received and accepted, or declined with a reason; a partial receipt stays open for the remainder.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
A completed entry is mistaken for the responsible person's decision.	Give the team lead the recorded response and agreed criteria for this decision.
People cannot see the method or evidence behind a decision.	Make methods, responsibilities and decision evidence visible for review.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Does the request fit the selected spending rules and approval responsibility?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact