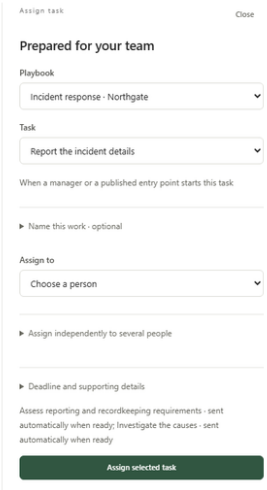
GET A PART OR SERVICE APPROVED AND RECEIVED

# Show what arrived and what still needs attention on a parts order

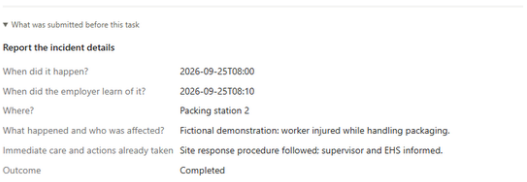
Record received quantity, condition and photos against the approved request. Mark a receipt partial or complete so the team can see accepted items and the outstanding balance with its next action.

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

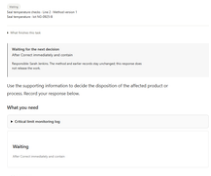
**SkillSmith · Choose prepared work and its recipient — incident-response example**




**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. |

## Record the remaining items and their next action

In a worked example, only part of the approved request arrives; record the accepted receipt and keep the remainder open with its next action.

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 | received quantity, condition and photo | Save the response with its work context. |
| Review point | approved | 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**<br>The task uses this material | The parts or service request form. |
| **Policy**<br>The task uses this material | Spending limits, approvers and acceptance rules. |
| **Reward catalog**<br>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 received quantity, condition, photo and partial or complete. 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 |
| --- | --- |
| **An incomplete response loses its correction route.** | Use waiting, return and correction paths with a responsible owner and retained context. |
| **An open item has no visible responsible next action.** | Inspect task state, related work and the responsible next action in Pulse. |

## 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.

- Which approved items were received and accepted, and what remains outstanding?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact