

## SERVICE

### WORK ORDERS – WORK IN PROGRESS

The Work in Progress (WIP) screen displays:

- **Parts** that have been issued or
- **Third Party Services** that have been received

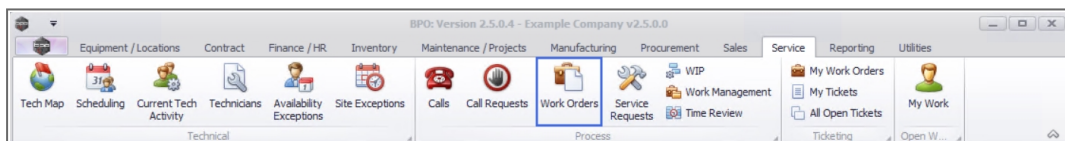
but have not yet been invoiced.

If these items are **non** billable, the work order, call or project will **not** have been closed yet.

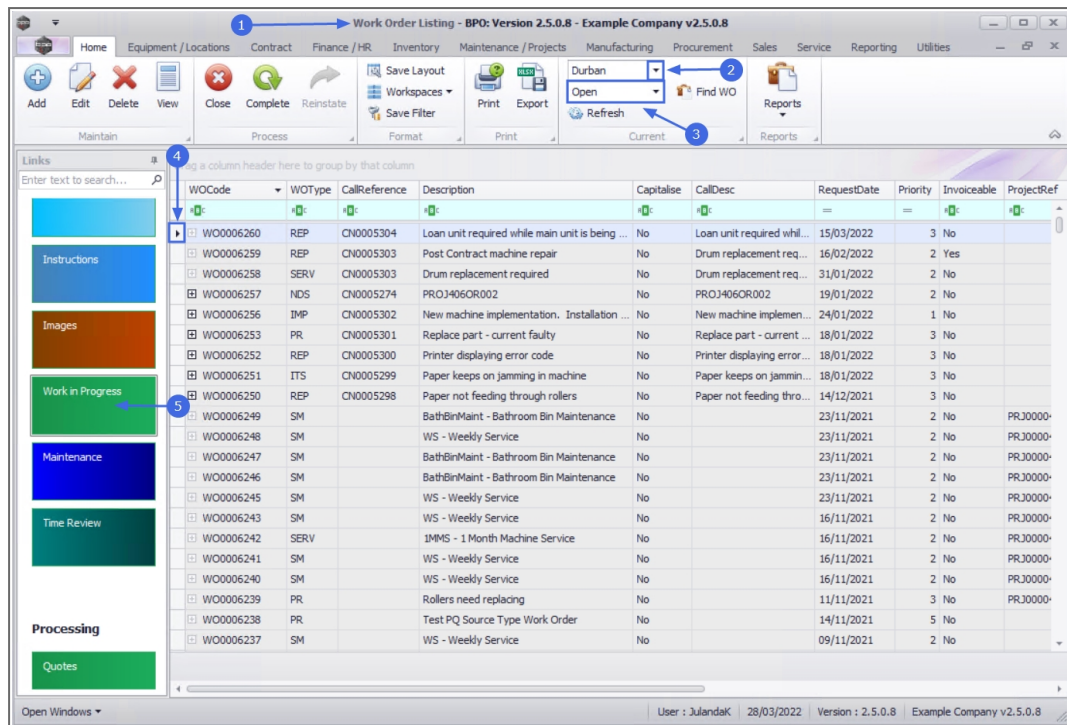
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**Ribbon Access:** *Service > Work Orders*

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1. The **Work Orders Listing** screen will be displayed.
2. Select the **Site** where the work order was issued.
  - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Click on the **row** of the work order you wish to view the Work in Progress for.
5. Click on the **Work In Progress** tile.



6. The **Work in Progress for WO Code** [work order code] screen will be displayed.

- The screen displays both **stock** or **internal assets** that have been issued, as well as **Third Party Services** that have been received
- If the items/services are billable - they have not been invoiced.
- If the items are non-billable, the linked work order, call or project has not yet been closed.

7. The **Doc No** column displays the, Work in Progress reference number for a **part** with a **SI** prefix to the number.

- A **service** Work in Progress will display as **SERVICE**.

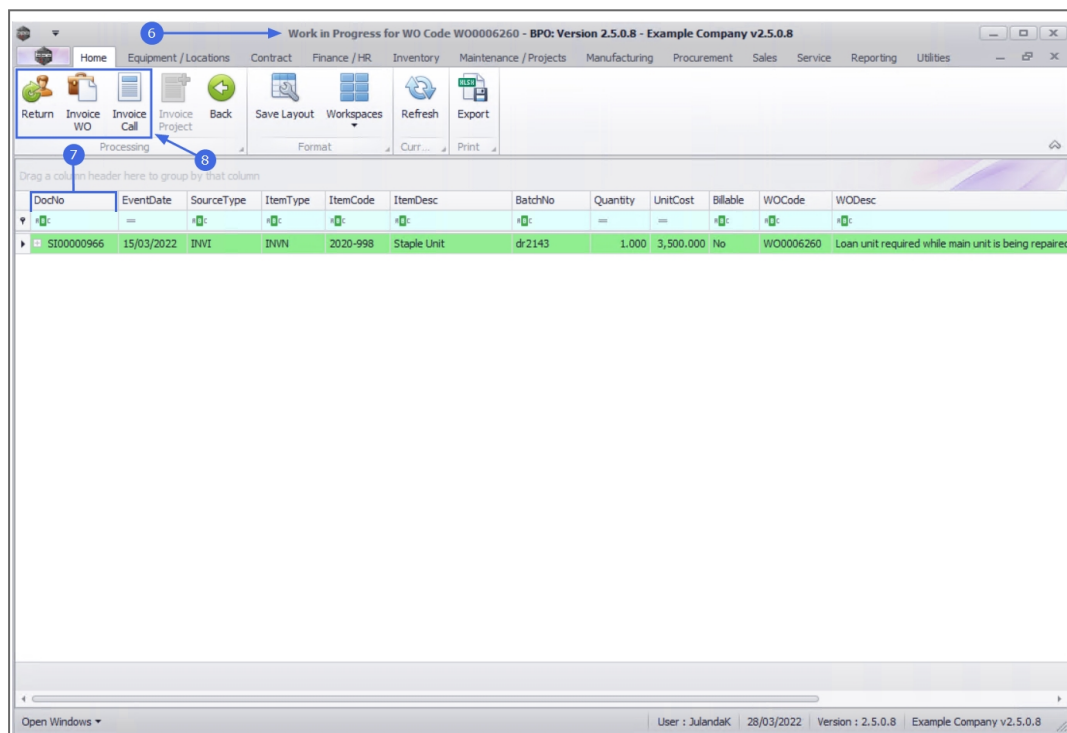
## WIP PROCESSING

8. From this screen, you can:

- Do a Return Request for an item or service,
- Invoice a work order, or
- Invoice Call.



The *Invoice Project* button has been greyed out indicating that a Project cannot be Invoiced from this screen.

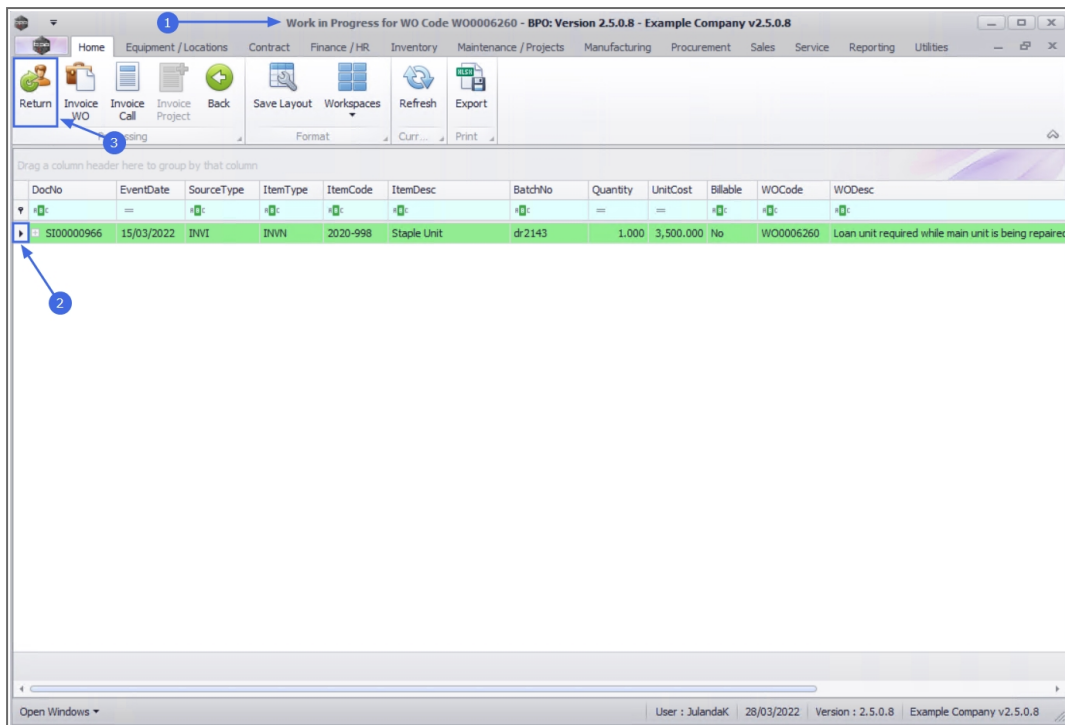


## RETURN REQUEST

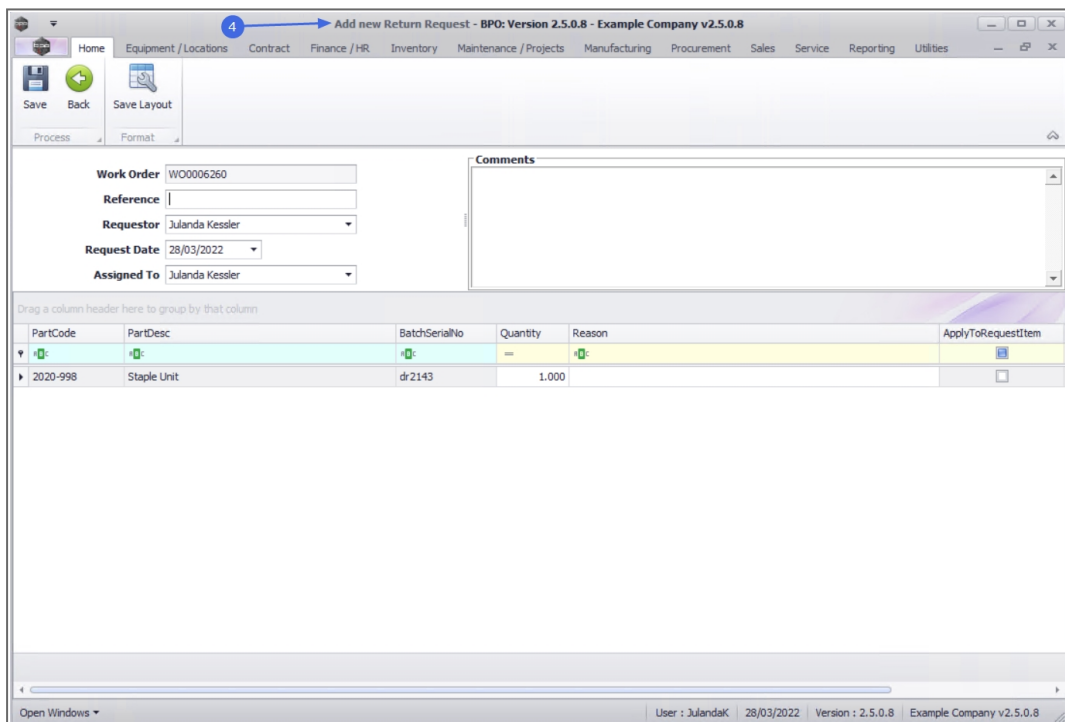
1. From the *Work in Progress for [work order code]* screen,
2. Click on the **row** of the Service or Part you wish to return.
3. Click on the **Return** button.



Short cut key: **Right click** to display the *Process* menu list. Click on **Return**.



4. "The Add new Return Request screen will be displayed. " on page 2

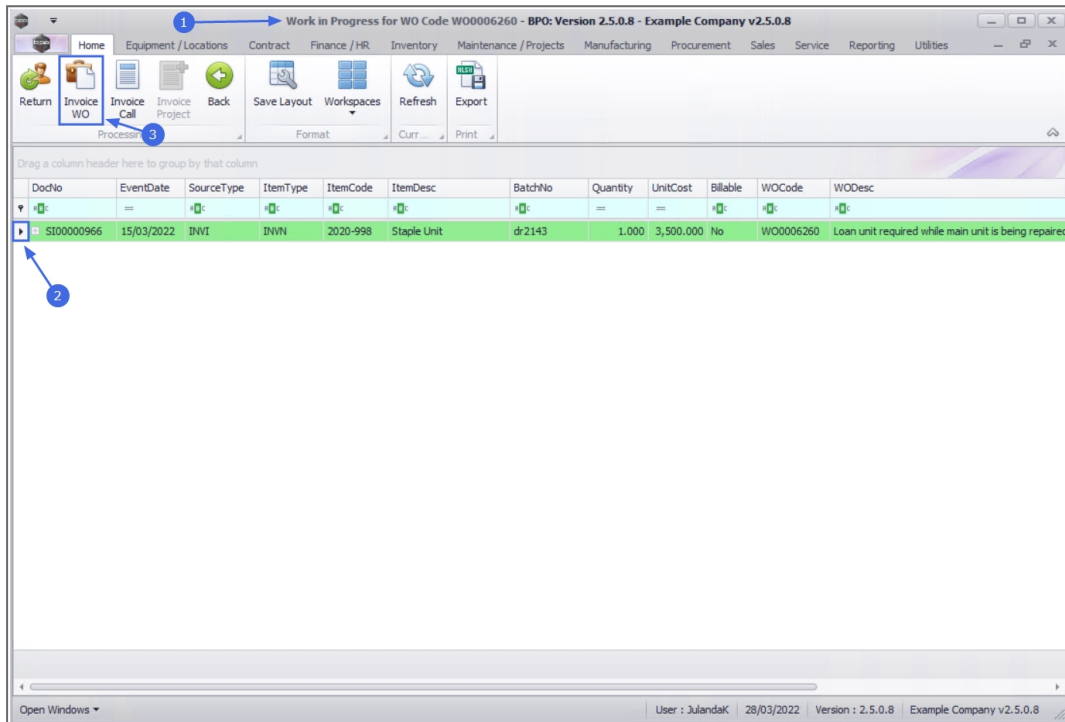


## INVOICE WORK ORDER

1. From the **Work in Progress for WO Code [work order code]** screen,
2. Click on the **row** of the Service or Part you wish to Invoice.
3. Click on **Invoice WO**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Invoice WO**.



4. The **Add new Customer Invoice** screen will be displayed.



Refer to [Work in Progress - Invoice Work Orders](#) for details on how to complete the Customer Invoice screen.

4 → Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Delete Item Save Layout

Maintain Format

Customer Name Office Supplies Unlimited  
 Contact Name  
 Commercial Type Class Commercial  
 Salesman Julanda Kessler  
 Billing Customer Office Supplies Unlimited  
 Invoice Currency South African Rand  
 Tax Rate 15.00 15

Reference  
 Status New  
 Date & Time 28/03/2022 14:25:10  
 Billing Contact  
 Exchange Rate 1  
☐ Suppress Line Detail on Print

Billing address  
 Shipping address

Addresses Related References

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Warranty	12MSW	12 Month Suppl...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000
	Select type...											

Comment

Sub Total 955.65  
 VAT 143.35  
 Grand Total 1,099.00

Open Windows User: JulandaK 28/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

## INVOICE CALL

1. From the **Work in Progress for WO Code** [work order code] screen,
2. Click on the **row** of the Service or Part that you wish to invoice.
3. Click on **Invoice Call**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Invoice Call**.

Work in Progress for WO Code WO0006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Return Invoice WO Invoice Call Invoice Project Back Save Layout Workspaces Refresh Export

Processing Format Curr... Print

Drag a column header here to group by that column

DochNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000966	15/03/2022	INVT	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired

Open Windows

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## 4. "Invoice Header" on page 2

Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Delete Item Save Layout

Maintain Format

Customer Name Office Supplies Unlimited \*  
 Contact Name Angie Smith \*  
 Commercial Type Class Commercial \*  
 Salesman Julanda Kessler \*  
 Billing Customer Office Supplies Unlimited \*  
 Invoice Currency South African Rand  
 Tax Rate 15.00 15

Reference  
 Status New  
 Date & Time 28/03/2022 14:27:06  
 Billing Contact  
 Exchange Rate 1

Billing address  
 PO Box 9632  
 Forest Hills

Shipping address  
 674 Nightwish Ave  
 Forest Hills  
 1234

☐ Suppress Line Detail on Print

Addresses Related References

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
<input type="checkbox"/>	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
<input type="checkbox"/>	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500
<input type="checkbox"/>	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
<input type="checkbox"/>	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
<input type="checkbox"/>	Warranty	12MSW	12 Month Suppli...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000
<input type="checkbox"/>	Select type...											

Comment

Sub Total 955.65  
 VAT 143.35  
 Grand Total 1,099.00

Open Windows

User : JulandaK 28/03/2022 Version : 2.5.0.8 Example Company v2.5.0.8

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