

SERVICE

CALLS – WORK IN PROGRESS

The Work in Progress (WIP) screen displays:

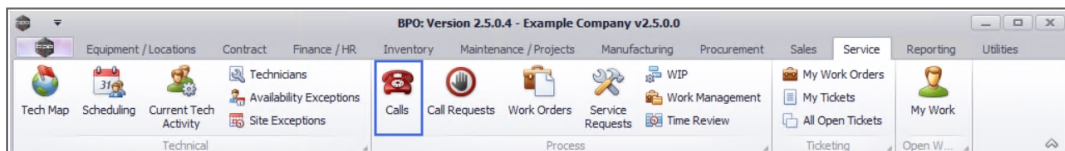
- **Parts** that have been issued or
- **Third Party Services** that have been received

but have not yet been invoiced.

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

Return Requests can be raised for ***Internal Assets*** to return the item to the ***Asset warehouse***.

Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.
2. Select the **Site** and **Status**.
 - The example has **Durban** as site and the **New** status selected.
3. Click on the **row** of the call you wish to view the Work in Progress for.
4. Click on **Edit**.

5. The **Call maintenance : Call ref - [call reference number]** screen will display.

6. Click on the **Work In Progress** Tile.

7. The **Work in Progress for Call, Ref No : [call ref. number]** 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 or services are billable, then they have not been invoiced.

If the items are non-billable, the linked work order, call or project has not yet been closed.

8. 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**.

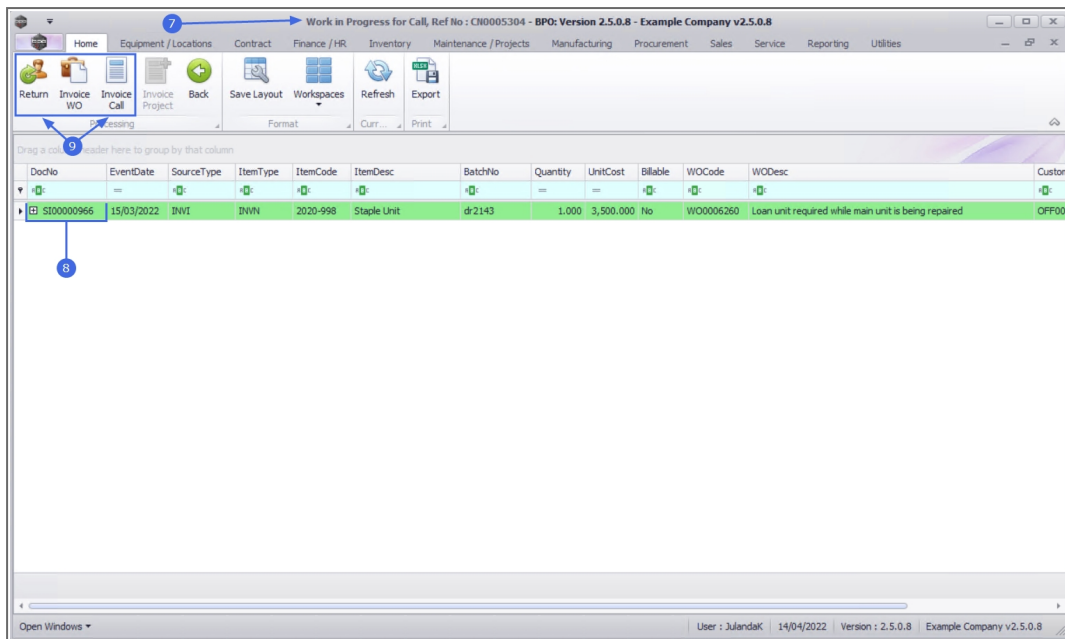
WIP PROCESSING

9. 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.

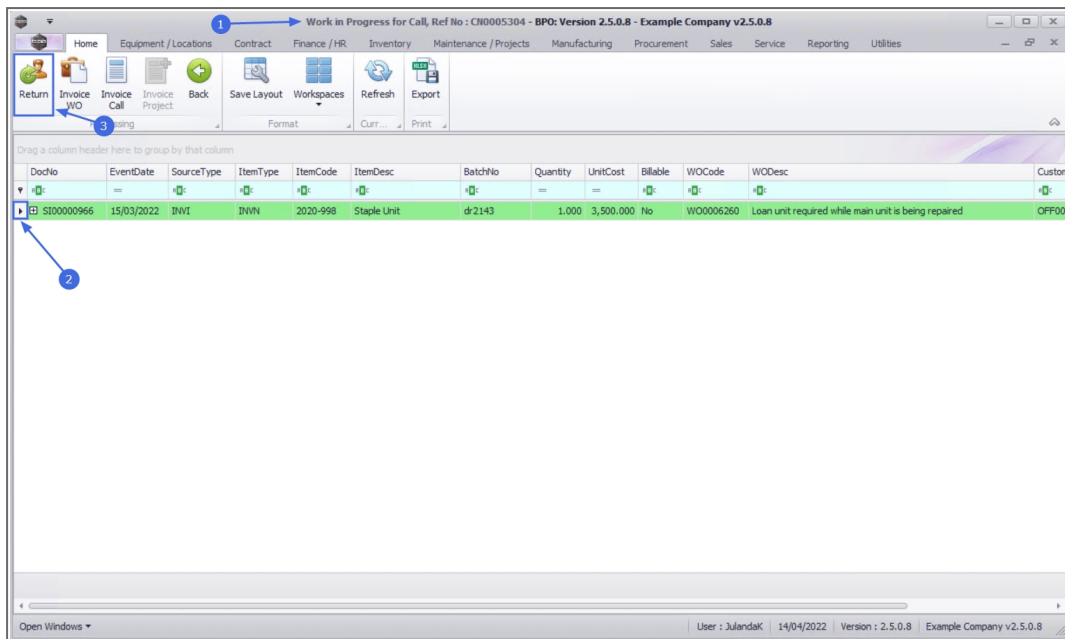


RETURN REQUEST

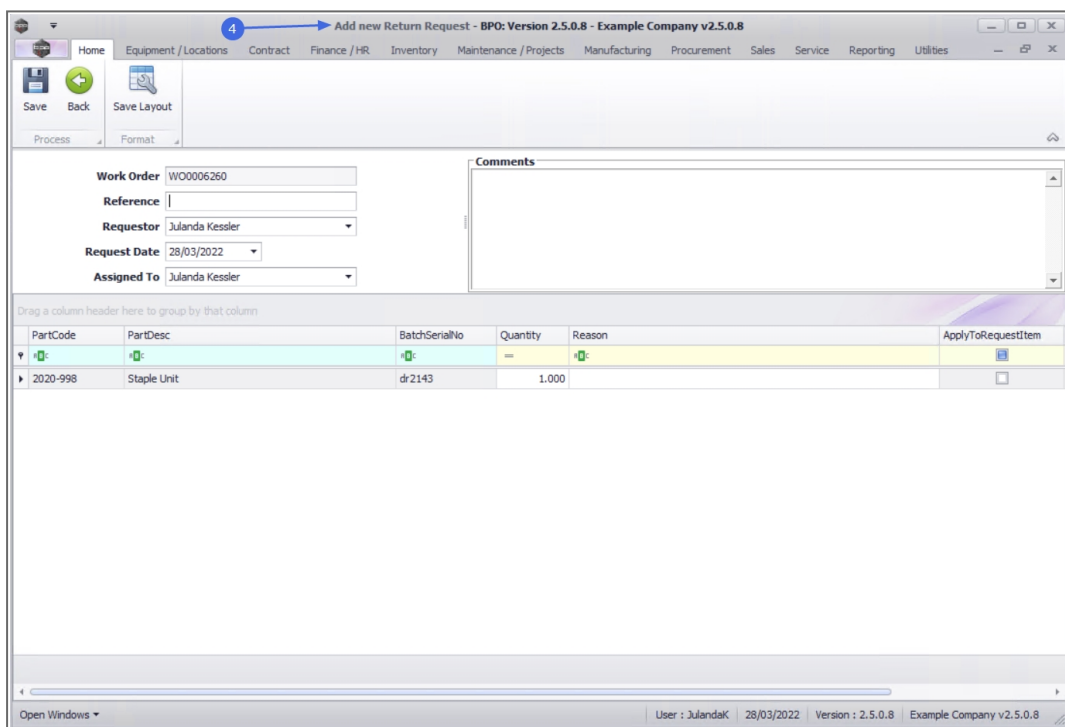
1. From the **Work in Progress for Call, Ref No: [call ref number]** screen,
2. Click on the **row** of the Service or Part you wish to return.
3. Click on the **Return** button.



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

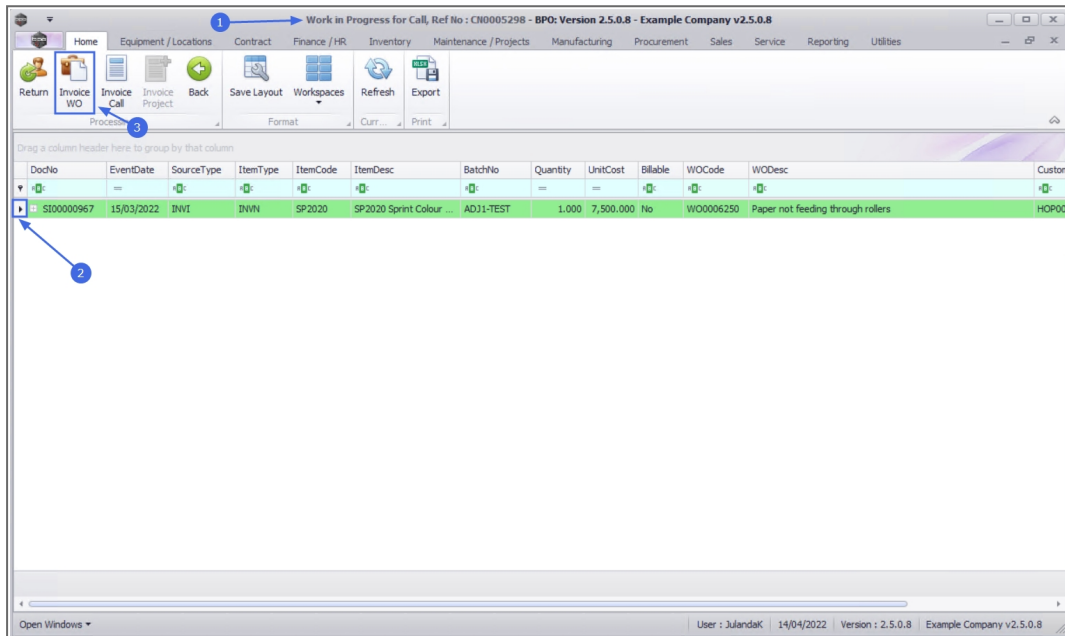


INVOICE WORK ORDER

1. From the **Work in Progress for Call, Ref No. : [call ref number]** 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 Return Request screen will be displayed. " on page 2

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 Call, Ref No: [call ref number]** 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 Call, Ref No : CN0005304 - 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 Back Save Layout Workspaces Refresh Export

Processing Format Curr... Print

Drag a column header here to group by that column

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000966	15/03/2022	INVT	INVN	2020-998	Staple Unit	dt2143	1.000	3,500.000	No	WO0005260	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

Reference

Status New

Date & Time 09/05/2022 15:01:03

Billing address

PO Box 9632
Forest Hills

Shipping address

674 Nightwish Ave
Forest Hills
1234

Billing Contact

Exchange Rate 1

Suppress Line Detail on Print

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Labour	ADMIN	Administration	Administration			1.000	98.000	10.000	0.000	107.800	107.800
	Select type...											

Comment

Sub Total 107.80

VAT 16.17

Grand Total 123.97

Open Windows

User : JulandaK 09/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8

MNU.122.043