

SERVICE

INTRODUCTION TO WORK IN PROGRESS (WIP)

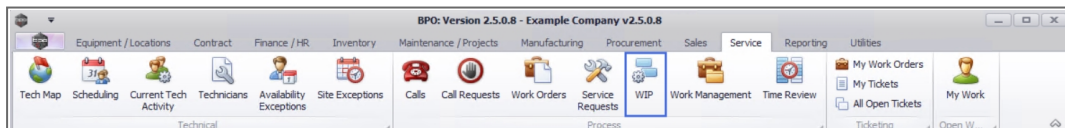
The Work in Progress (WIP) screen displays:

- **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 > WIP*



1. The ***Work in Progress for all work orders*** listing screen will be displayed.

The screen displays:

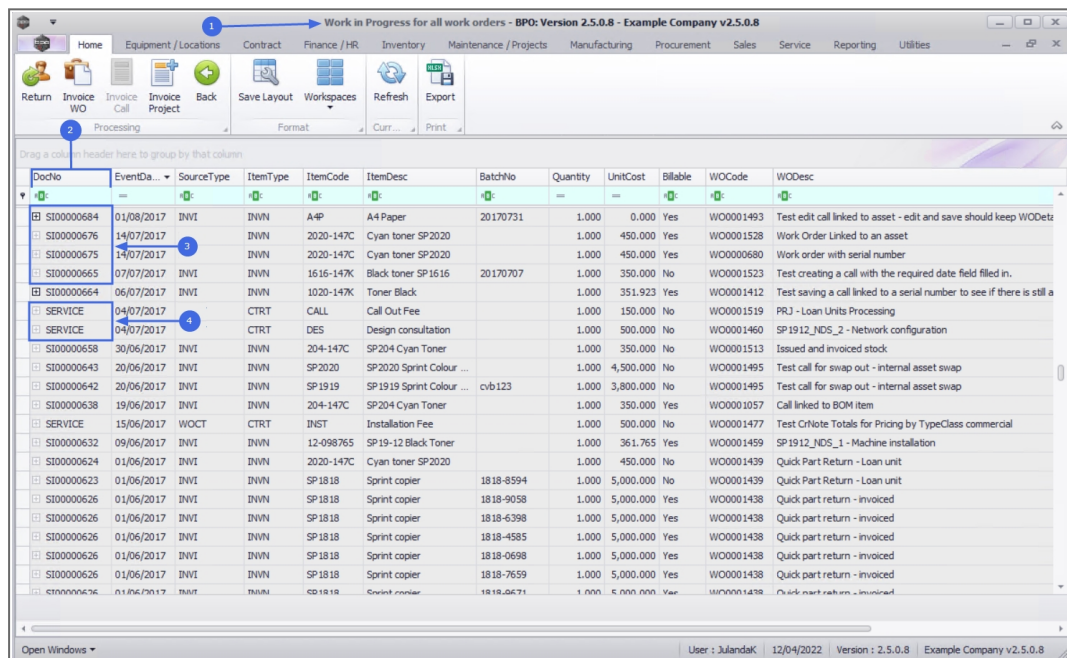
- **stock** or
- **internal assets** that have been issued, as well as
- **Third Party Services** that have been received.

If the items/services are *billable*, then it is an indication that they have not yet been invoiced.

If the items are *non billable*, then it is an indication that the linked work order, call or project has not yet been closed.

WIP DATA GRID

2. In the **Doc No** column,
3. a **part** WIP record is displayed as a **document number**, for example *SI00001000*
4. and a **service** WIP record is displayed as **SERVICE**.



| DocNo | EventDate | SourceType | ItemType | ItemCode | ItemDesc | BatchNo | Quantity | UnitCost | Billable | WOCODE | WODesc |
|------------|------------|------------|----------|-----------|--------------------------|-----------|----------|-----------|----------|-----------|---|
| SI00000684 | 01/08/2017 | INVI | INVN | A4P | A4 Paper | 20170731 | 1.000 | 0.000 | Yes | WO0001493 | Test edit call linked to asset - edit and save should keep WODets |
| SI00000676 | 14/07/2017 | INVI | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 450.000 | Yes | WO0001528 | Work Order Linked to an asset |
| SI00000675 | 14/07/2017 | INVI | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 450.000 | Yes | WO0000680 | Work order with serial number |
| SI00000665 | 07/07/2017 | INVI | INVN | 1616-147K | Black toner SP1616 | 20170707 | 1.000 | 350.000 | No | WO0001523 | Test creating a call with the required date field filled in. |
| SI00000664 | 06/07/2017 | INVI | INVN | 1020-147K | Toner Black | | 1.000 | 351.923 | Yes | WO0001412 | Test saving a call linked to a serial number to see if there is still a |
| SERVICE | 04/07/2017 | CTRT | CALL | | Call Out Fee | | 1.000 | 150.000 | No | WO0001519 | PRJ - Loan Units Processing |
| SERVICE | 04/07/2017 | CTRT | DES | | Design consultation | | 1.000 | 500.000 | No | WO0001460 | SP1912_NDS_2 - Network configuration |
| SI00000658 | 30/06/2017 | INVI | INVN | 204-147C | SP204 Cyan Toner | | 1.000 | 350.000 | No | WO0001513 | Issued and invoiced stock |
| SI00000643 | 20/06/2017 | INVI | INVN | SP2020 | SP2020 Sprint Colour ... | | 1.000 | 4,500.000 | No | WO0001495 | Test call for swap out - internal asset swap |
| SI00000642 | 20/06/2017 | INVI | INVN | SP1919 | SP1919 Sprint Colour ... | cvb123 | 1.000 | 3,800.000 | No | WO0001495 | Test call for swap out - internal asset swap |
| SI00000638 | 19/06/2017 | INVI | INVN | 204-147C | SP204 Cyan Toner | | 1.000 | 350.000 | Yes | WO0001057 | Call linked to BOM item |
| SERVICE | 15/06/2017 | WOCT | INST | | Installation Fee | | 1.000 | 500.000 | No | WO0001477 | Test CrNote Totals for Pricing by TypeClass commercial |
| SI00000632 | 09/06/2017 | INVI | INVN | 12-098765 | SP19-12 Black Toner | | 1.000 | 361.765 | Yes | WO0001459 | SP1912_NDS_1 - Machine installation |
| SI00000624 | 01/06/2017 | INVI | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 450.000 | No | WO0001439 | Quick Part Return - Loan unit |
| SI00000623 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-8594 | 1.000 | 5,000.000 | No | WO0001439 | Quick Part Return - Loan unit |
| SI00000626 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-9058 | 1.000 | 5,000.000 | Yes | WO0001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-6398 | 1.000 | 5,000.000 | Yes | WO0001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-4585 | 1.000 | 5,000.000 | Yes | WO0001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-0698 | 1.000 | 5,000.000 | Yes | WO0001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-7659 | 1.000 | 5,000.000 | Yes | WO0001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVI | INVN | SP1818 | Sprint copier | 1818-0671 | 1.000 | 5,000.000 | Yes | WO0001438 | Quick part return - invoiced |

PROCESSING ACTION BUTTONS

From this screen, you can:

- Return an item or service using the **Return** button.
- Invoice a work order using the **Invoice WO** button.

- Work in Progress for all work orders - 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 Invoice Invoice Back Save Layout Workspaces Refresh Export

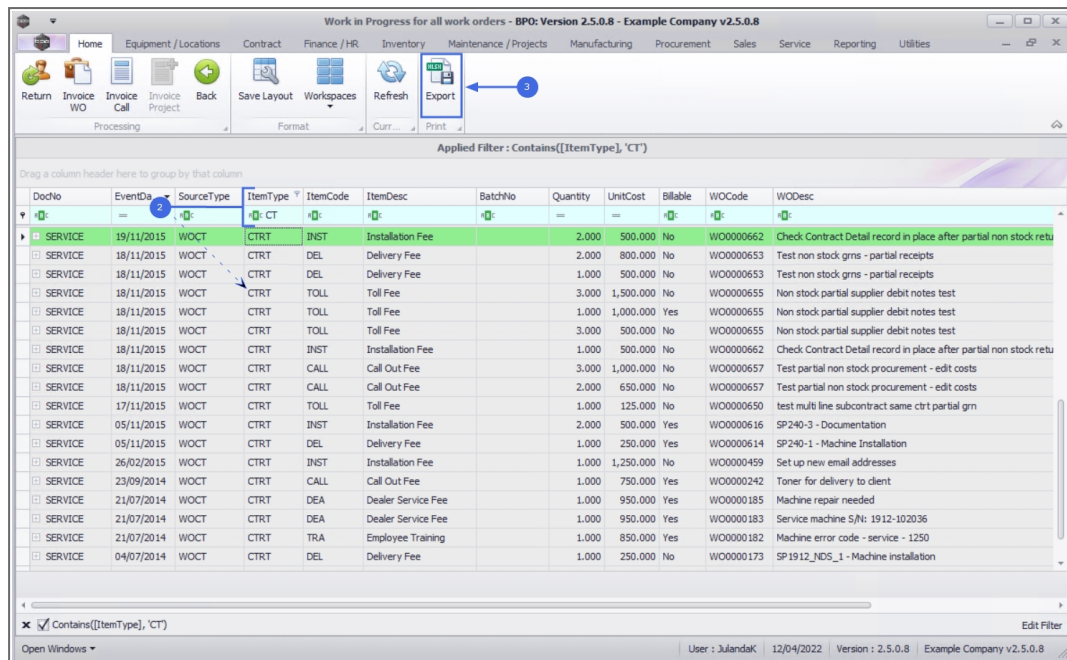
Return Invoice Invoice Invoice

| Doc | Return | Invoice WO | Invoice Call | Invoice Project | Disc | BatchNo | Quantity | UnitCost | Billable | WOCCode | WODesc |
|------------|------------|------------|--------------|-----------------|--------------------------|-----------|----------|-----------|----------|-----------|---|
| SI00000675 | 14/07/2017 | INVT | INVN | 2020-147C | Cyan toner SP2020 | 20170731 | 1.000 | 0.000 | Yes | W00001493 | Test edit call linked to asset - edit and save should keep WODet |
| SI00000665 | 14/07/2017 | INVT | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 450.000 | Yes | W00001528 | Work order Linked to an asset |
| SI00000665 | 07/07/2017 | INVT | INVN | 1616-147K | Black toner SP1616 | 20170707 | 1.000 | 350.000 | No | W00001523 | Test creating a call with the required date field in. |
| SI00000664 | 06/07/2017 | INVT | INVN | 2020-147K | Toner Black | | 1.000 | 351.923 | Yes | W00001412 | Test saving a call linked to a serial number to see if there is still a |
| SERVICE | 04/07/2017 | WOCT | CTRT | CALL | Call Out Fee | | 1.000 | 150.000 | Yes | W00001519 | PRJ - Loan Units Processing |
| SERVICE | 04/07/2017 | WOCT | CTRT | DES | Design consultation | | 1.000 | 500.000 | No | W00001460 | SP1912_NDS_2 - Network configuration |
| SI00000658 | 30/06/2017 | INVT | INVN | 204-147C | SP204 Cyan Toner | | 1.000 | 350.000 | No | W00001513 | Issued and invoiced stock |
| SI00000643 | 20/06/2017 | INVT | INVN | SP2020 | SP2020 Sprint Colour ... | | 1.000 | 4,500.000 | No | W00001495 | Test call for swap out - internal asset swap |
| SI00000642 | 20/06/2017 | INVT | INVN | SP1919 | SP1919 Sprint Colour ... | cub123 | 1.000 | 3,800.000 | No | W00001495 | Test call for swap out - internal asset swap |
| SI00000638 | 19/06/2017 | INVT | INVN | 204-147C | SP204 Cyan Toner | | 1.000 | 350.000 | Yes | W00001057 | Call linked to BOM item |
| SERVICE | 15/06/2017 | WOCT | CTRT | INST | Installation Fee | | 1.000 | 500.000 | No | W00001477 | Test CrNote Totals for Pricing by TypeClass commercial |
| SI00000632 | 09/06/2017 | INVT | INVN | 12-098765 | SP19-12 Black Toner | | 1.000 | 361.765 | Yes | W00001459 | SP1912_NDS_1 - Machine installation |
| SI00000624 | 01/06/2017 | INVT | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 450.000 | No | W00001439 | Quick Part Return - Loan unit |
| SI00000623 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-8594 | 1.000 | 5,000.000 | No | W00001439 | Quick Part Return - Loan unit |
| SI00000626 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-9058 | 1.000 | 5,000.000 | Yes | W00001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-6398 | 1.000 | 5,000.000 | Yes | W00001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-4585 | 1.000 | 5,000.000 | Yes | W00001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-0698 | 1.000 | 5,000.000 | Yes | W00001438 | Quick part return - invoiced |
| SI00000626 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-7659 | 1.000 | 5,000.000 | Yes | W00001438 | Quick part return - invoiced |
| SI00000636 | 01/06/2017 | INVT | INVN | SP1818 | Sprint copier | 1818-0671 | 1.000 | 5,000.000 | Yes | W00001438 | Quick part return - invoiced |

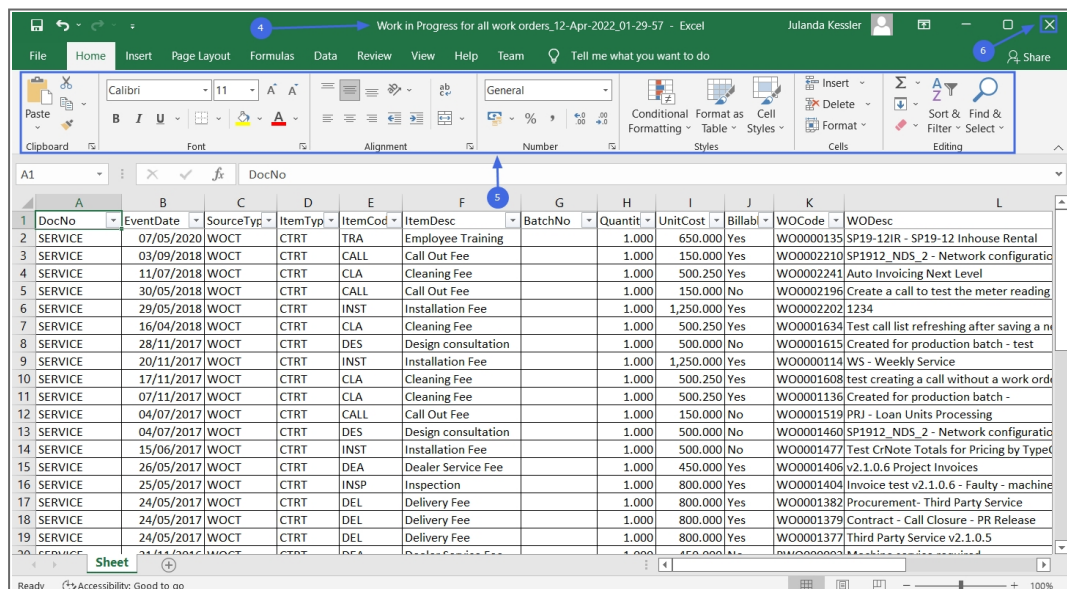
Open Windows

User: julandaK 12/04/2022 Version: 2.5.0.8 Example Company v2.5.0.8

1. You can choose to export a list of ***all*** the Work in Progress records,
2. or a ***selected list***, by refining the list by filtering the data grid using the filter row.
3. Click on ***Export***.



4. The list of Work in Progress records will display be exported to an **Excel spreadsheet**.
5. Make the necessary **changes** to the spreadsheet, **save** and **print** from Excel, as required.
6. **Close** the screen to return to the Work In Progress for all work orders screen.





BPO.MNU.077

