

PROJECTS

PROJECTS - EXPENSES

If you cannot log expenses due the message, 'No Items to select from', then expenses haven't been set up yet. Refer to Expense Allocation and Setup.

Ribbon Access: Maintenance/ Projects > Projects



Projects - Expenses

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The *Project Listing* screen will be displayed.



- Select the *site*.
 - In this image *Durban* has been selected.

Home Equipm	ent and	Locations	Contract	Finance and HR.	Inventory	Mainter	vance and P	Projects Mar	nufacturing Ph	ocurement :	Sales Service Rep	orting Utilities	- # >
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- Click on the *row selector* in front of the *project* that you wish to add expenses to.
- Click on the *Work Orders* tile.



Projects - Expenses

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The Work Orders for Project Ref [] listing screen will be displayed.



- Click on the *row selector* in front of the *Work Order* you wish to allocate expenses to.
- Click on the *Expenses* tile.





The *Expense Claims for Work Order Code []* listing screen will be displayed.

• Click on Add.



Projects - Expenses

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The *Expense Entry* screen will be displayed.



- Work Order: This will auto populate with the Work Order you initially selected.
- **Employee:** Click on the drop-down arrow and select the employee from the menu.
- **Expense Date:** This will default to the current date, click on the drop-down arrow and use the calendar function to change the date if required.
- **Type:** Click on the drop-down arrow and select the type of expense from the menu.
- **Detailed Description:** Type in a description for this expense.
- **Source Reference:** Type in the reference number of the receipt if available.
- Source Available: Select if the receipt is available.
- **Amount:** Type in the total amount of the expense.
- **Billable:** Select this option if the service is billable. This will be set to billable by default, unless the service is linked to the contract as an inclusion.



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• When you have finished adding the details, click on *Save*.



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• An *Expense Processing* message box will pop up informing you that;



• Expense Claim on WO: [] complete.

• Click on OK.





• You will return to the *Expense Claims for WO Code []* listing screen where you can now view the added expense claim.

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