

# PROJECTS

## PROJECTS – 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.

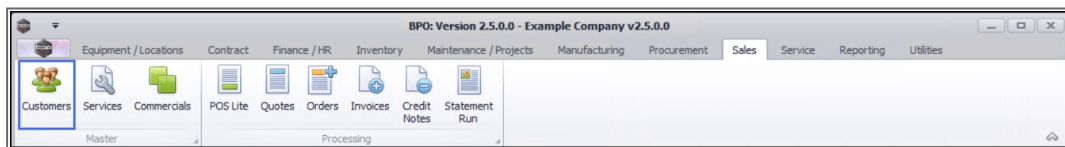
If these items are **non** billable, the work order, call or project will **not** have been closed yet.

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

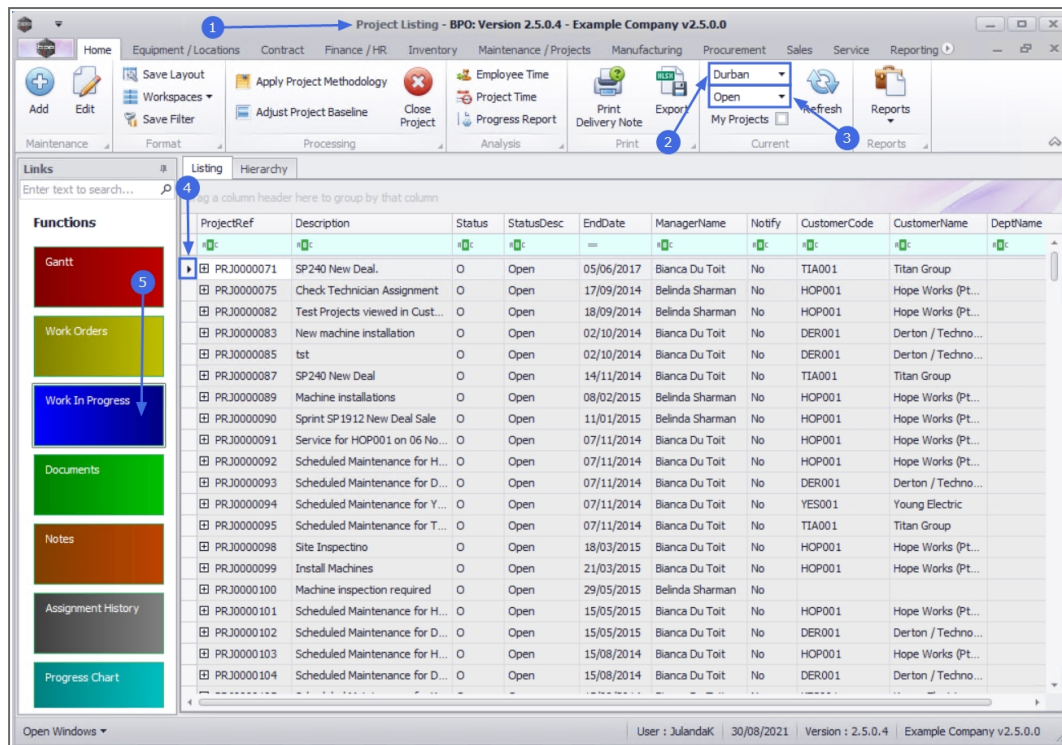
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**Ribbon Access:** *Maintenance / Projects > Projects*

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



6. The **Work in Progress for Project, Ref No : [project ref number]** listing 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 a project.



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

Work in Progress for Project, Ref No : PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

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

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000800	29/05/2018	INVI	INVN	9855632	Air Freshner		1.000	22.641	No	WO0000286	WS - Weekly Service
SI00000801	29/05/2018	INVI	INVN	CL-100-965	Cleaner		1.000	13.329	No	WO0000286	WS - Weekly Service
SI00000815	02/07/2018	INVI	INVN	CL-100-965	Cleaner	789	1.000	13.329	No	WO0000206	SP240-2 - Network setup - test edi wor

Open Windows

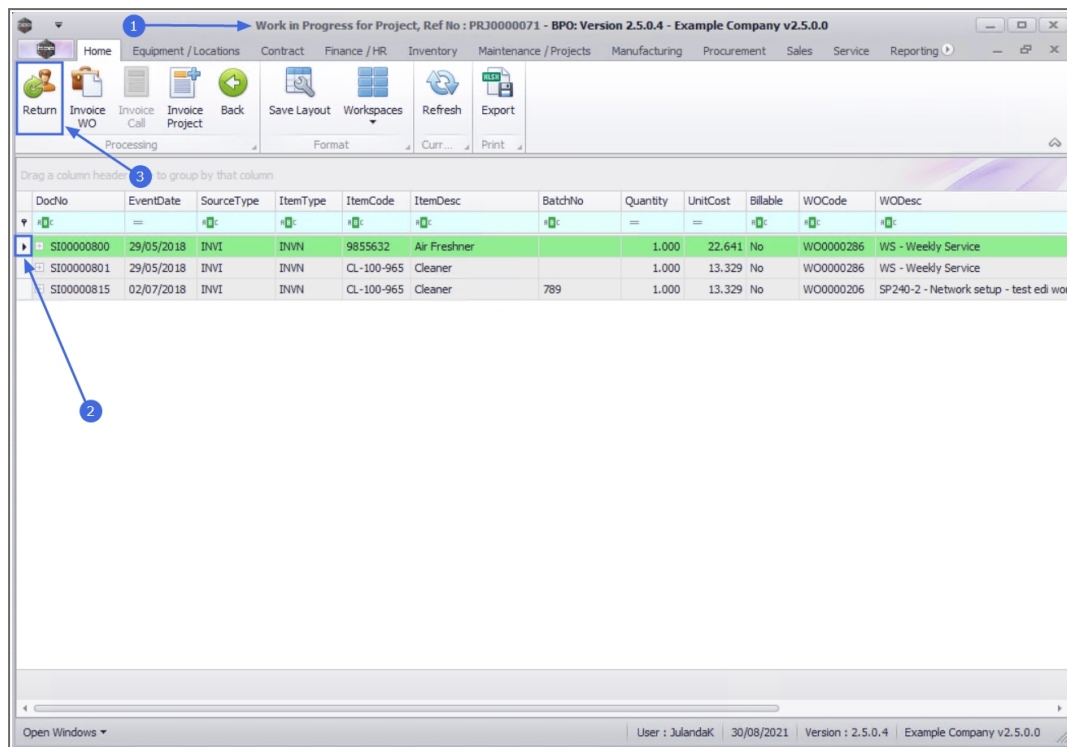
User : JulandaK | 30/08/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

## RETURN REQUEST

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



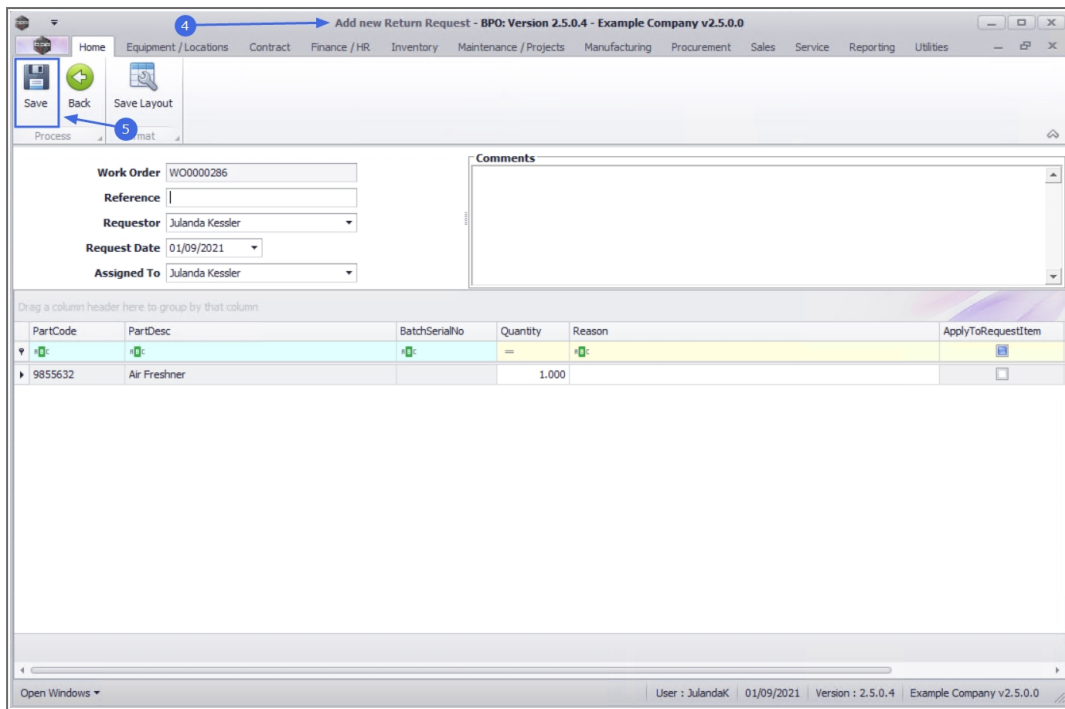
Short cut key: **Right click** to display the **Process** menu list. Click on **Return**.



4. "The Add new Return Request screen will be displayed." on page 2
5. After completing all the required information, click on **Save**.



For a detailed handling of this topic refer to **Work in Progress - Returns**



## INVOICE WORK ORDER

1. From the **Work in Progress for Project, Ref No : [project ref number]** listing screen,
2. Click on the **row** of the Service or Part that you wish to Invoice.
3. Click on **Invoice WO**.



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

Work in Progress for Project, Ref No : PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

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

Processing Format Curr... Print

Drag a column header here to sort by that column

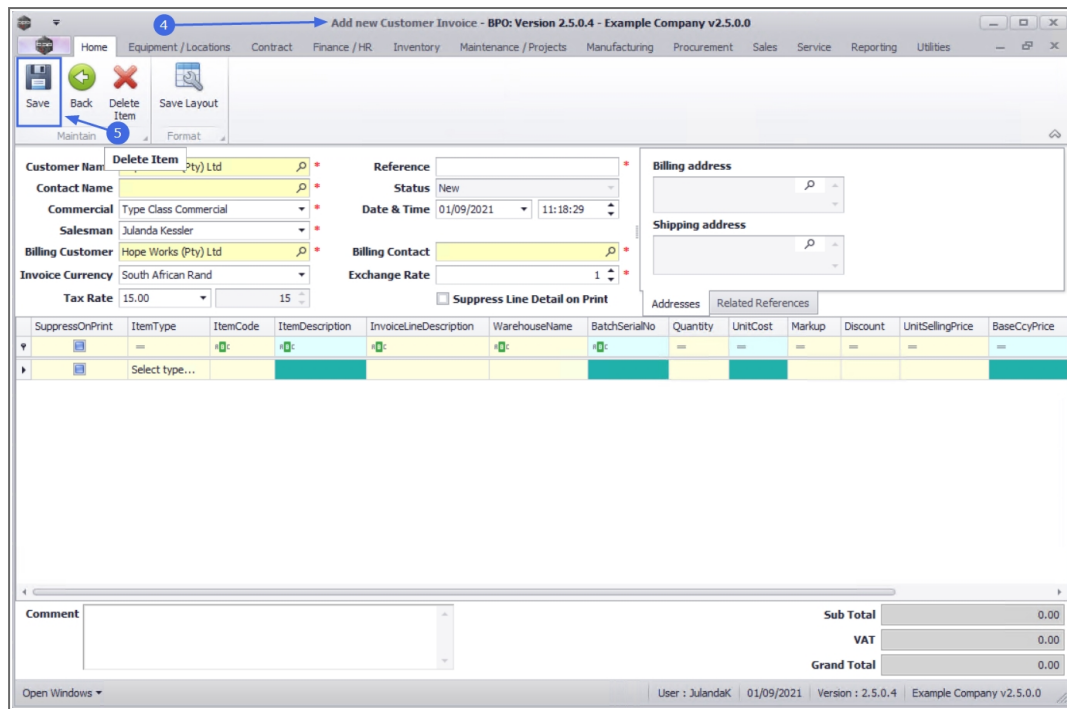
DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc
SI00000800	29/05/2018	INVI	INVN	9855632	Air Freshner		1.000	22.641	No	WO0000286	WS - Weekly Service
SI00000801	29/05/2018	INVI	INVN	CL-100-965	Cleaner		1.000	13.329	No	WO0000286	WS - Weekly Service
SI00000815	02/07/2018	INVI	INVN	CL-100-965	Cleaner	789	1.000	13.329	No	WO0000206	SP240-2 - Network setup - test edi wor

Open Windows User : JulandaK 30/08/2021 Version : 2.5.0.4 Example Company v2.5.0.0

4. " The Add new Customer Invoice screen will display. " on page 2
5. After completing all the required information, click on **Save**.



For a detailed handling of this topic refer to [Work in Progress - Invoice Work Orders](#)

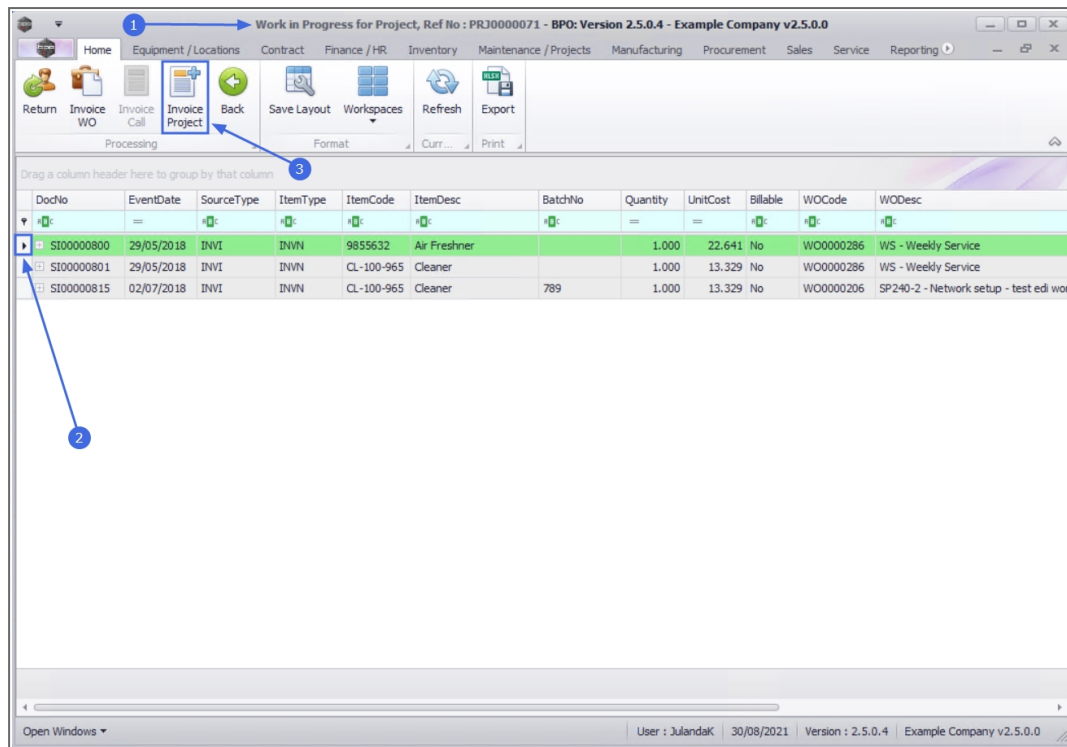


## INVOICE PROJECT

1. From the **Work in Progress for Project, Ref No : [project ref number]** listing screen,
2. Click on the **row** of the Service or Part that you wish to invoice.
3. Click on **Invoice Project**.



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



DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc
SI00000800	29/05/2018	INVI	INVN	9855632	Air Freshner		1.000	22.641	No	WO0000286	WS - Weekly Service
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4. " The Add new Customer Invoice screen will display. " on page 2
5. After completing all the required information, click on **Save**.



For a detailed handling of this topic refer to [Work in Progress - Invoice Project](#)



4 Add new Customer Invoice - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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 Titan Group \*  
 Contact Name \*  
 Commercial Discount Commercial \*  
 Salesman Julanda Kessler \*  
 Billing Customer \*  
 Invoice Currency South African Rand  
 Tax Rate 15.00 15

Reference \*  
 Status New  
 Date & Time 01/09/2021 11:25:28  
 Billing Contact \*  
 Exchange Rate 1

Billing address  
 Shipping address

Addresses Related References

☐ Suppress Line Detail on Print

SuppressOnPrint	Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch/Serial No	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Ccy Price
Select type...												

Comment

Sub Total 0.00  
 VAT 0.00  
 Grand Total 0.00

Open Windows User: JulandaK 01/09/2021 Version: 2.5.0.4 Example Company v2.5.0.0

MNU.058.021

