

SERVICE

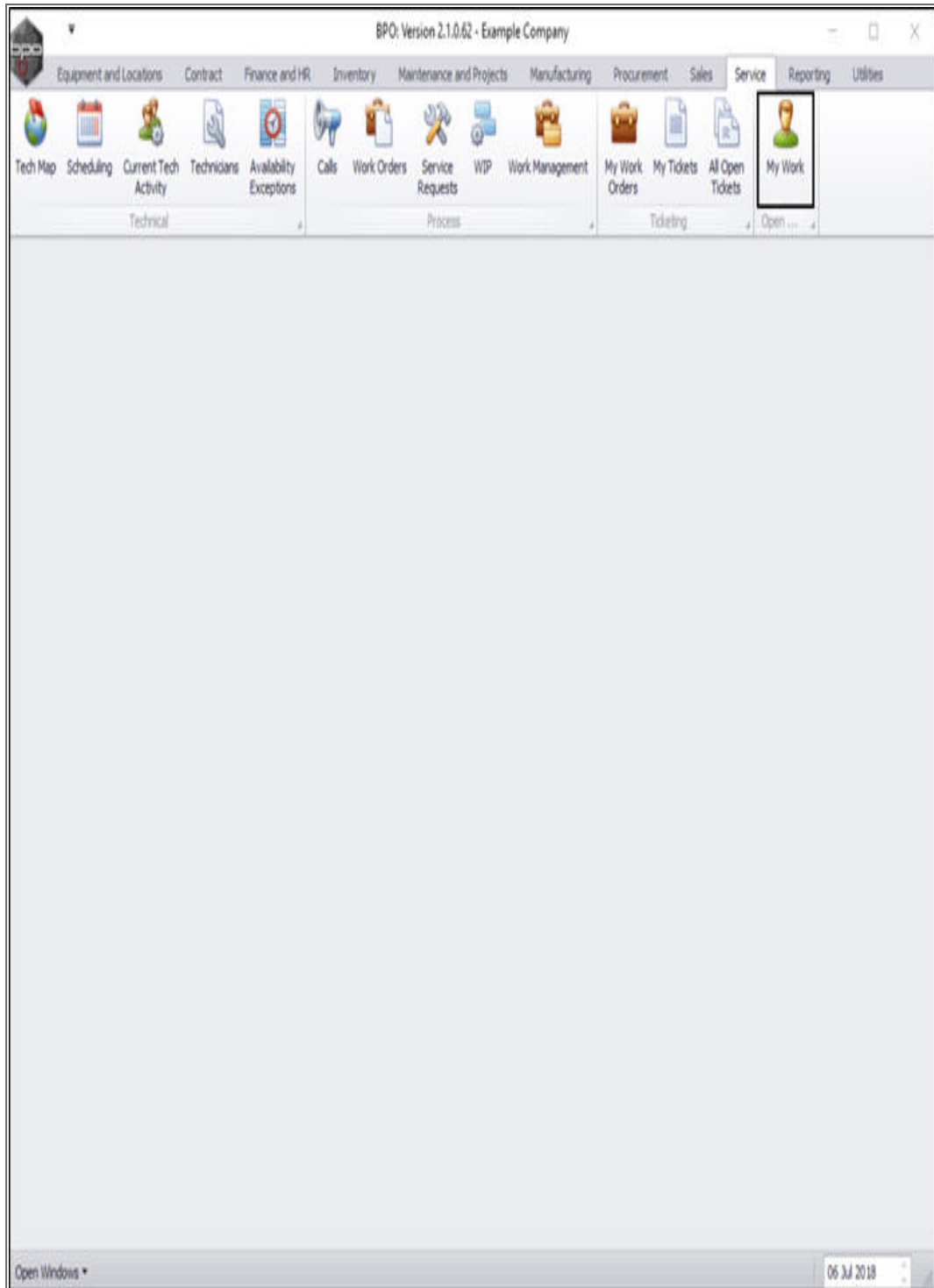
MY WORK – ADD EXPENSES

Expenses can be logged against the work order via the **My Work** screen.

Confirm with your supervisor as to whether you will log your expenses, or whether call centre administration will do this.

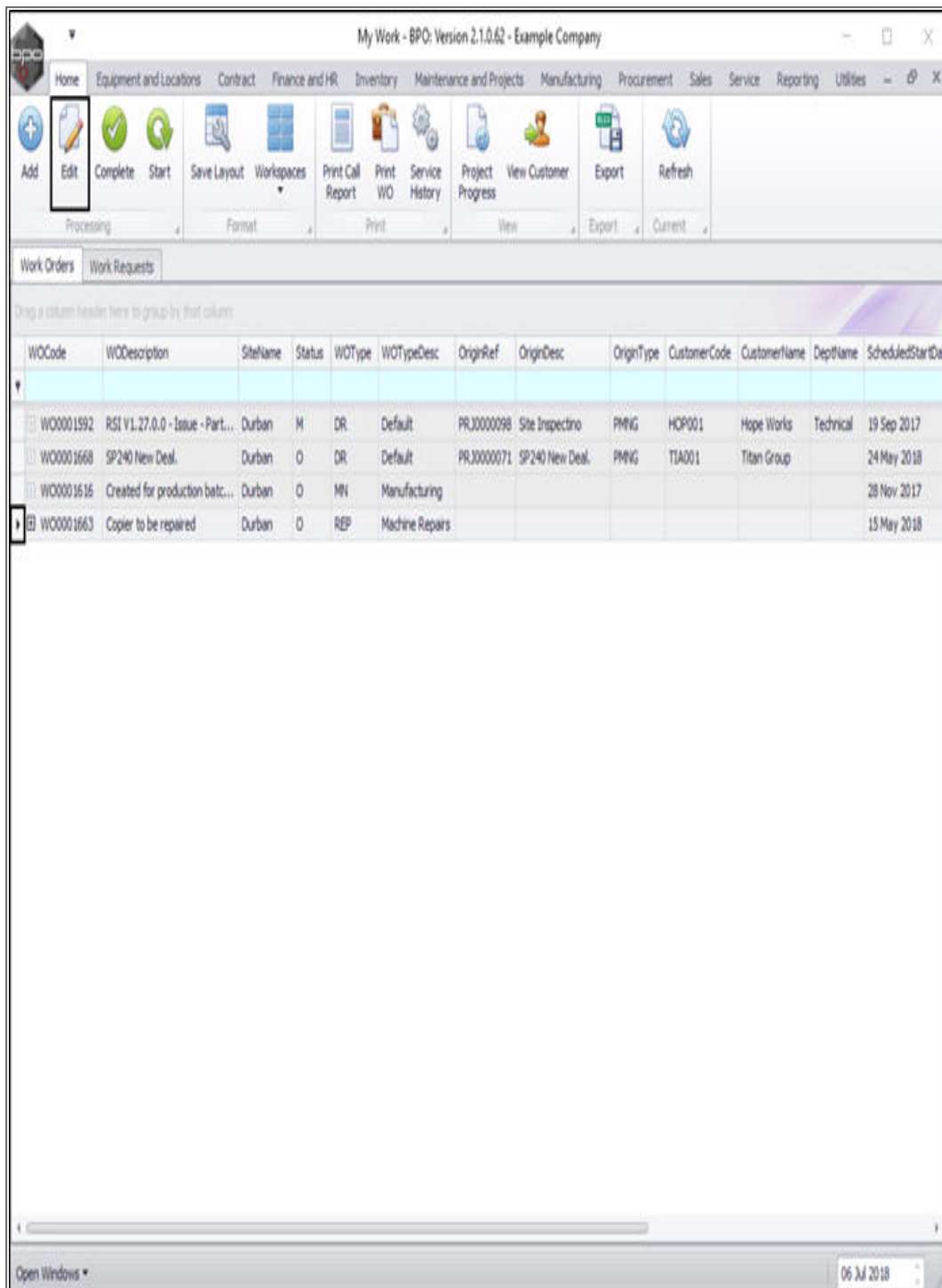
A technician who does not use Tech Connect, but has access to BPO will use this method in order to log his expenses.

Ribbon Access: *Service > My Work*



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **log expenses**.
- Click on **Edit**.



My Work - BPO: Version 2.1.0.42 - Example Company

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

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

WCode	WDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	ScheduledStartDa
WO0001592	RSI V1.27.0.0 - Issue - Part...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	19 Sep 2017
WO0001668	SP240 New Deal.	Durban	O	DR	Default	PRJ0000071	SP240 New Deal.	PMNG	TTA001	Titan Group		24 May 2018
WO0001616	Created for production batc...	Durban	O	MN	Manufacturing							28 Nov 2017
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15 May 2018

Open Windows 06 Jul 2018

The **Maintain WO - Ref []** screen will be displayed.

- Click on the **Expenses** tile.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.62 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Parts

Loans

Swap Out

Meters

Expenses

Travel

Documents

Warranties Issued

Meters

Open Windows

Description Copier to be repaired

Requestor Abigail Mine

WO Type Repair

Priority 2

Request Date 15 May 2018 10:40:28

Status Open

Billable

Capitalise

Work Order Item

Functional Location Equipment

Item 19-12345

Comment

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	

Schedule

Assigned To Abigail Mine

Assigned By Belinda Sharman

Scheduled Start 15 May 2018 10:40:29

Scheduled End 14 Jun 2018 00:00:00

Actual Start 18 Jun 2018 08:30:00

Actual End 18 Jun 2018 10:30:00

Delay Comments Client not available until the actual start date.

Rectification Code Replaced components

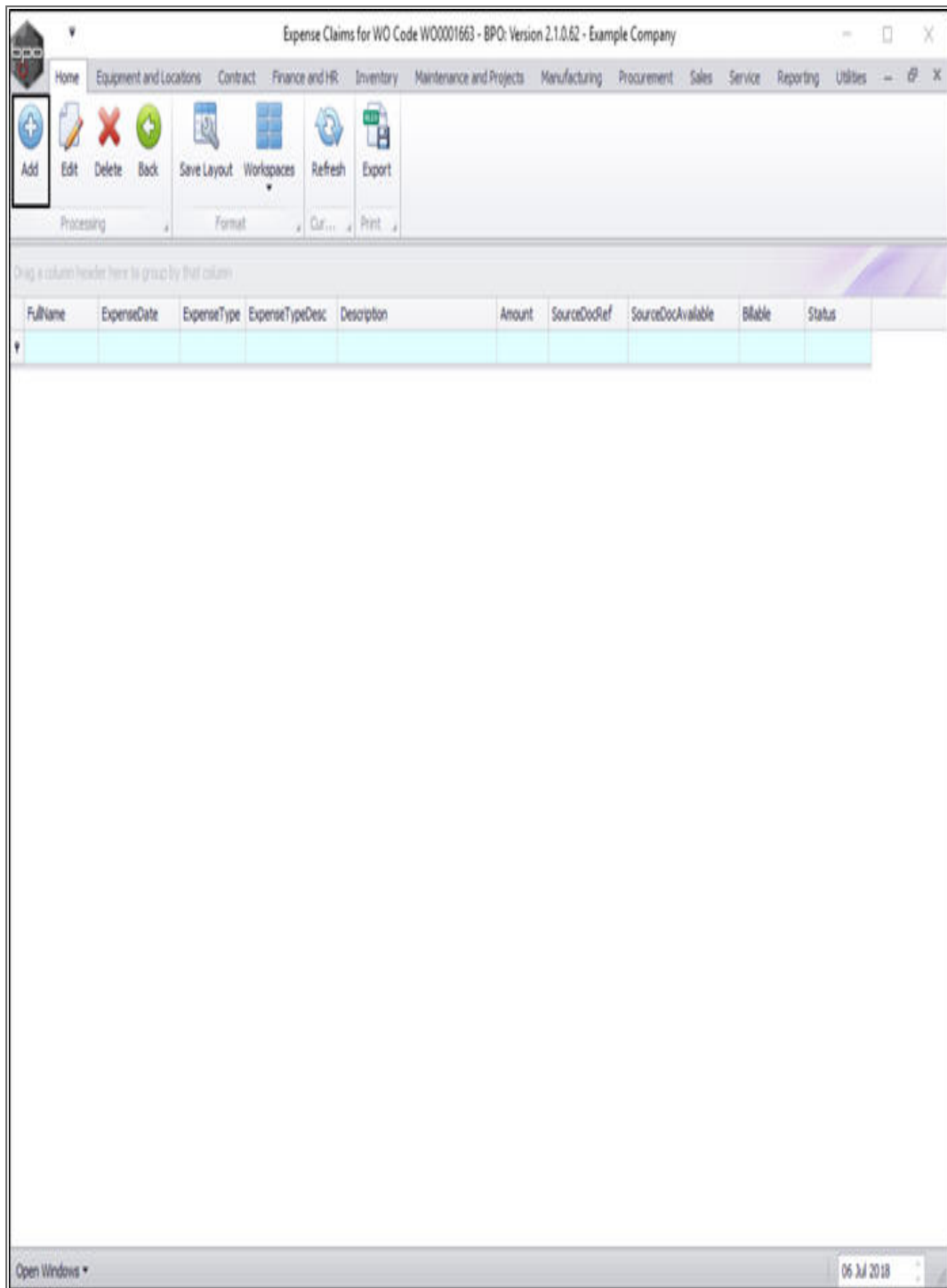
Rectification Comments Parts replaced, machine cleaned and tested. Job complete

Completion Date 18 Jun 2018 00:00:00

06 Jul 2018

The **Expense Claims for WO Code []** will be displayed.

- Click on **Add**.



Expense Claims for WO Code WO0001663 - BPO: Version 2.1.0.62 - Example Company

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

Add Edit Delete Back Save Layout Workspaces Refresh Export

Processing Format Cur... Print

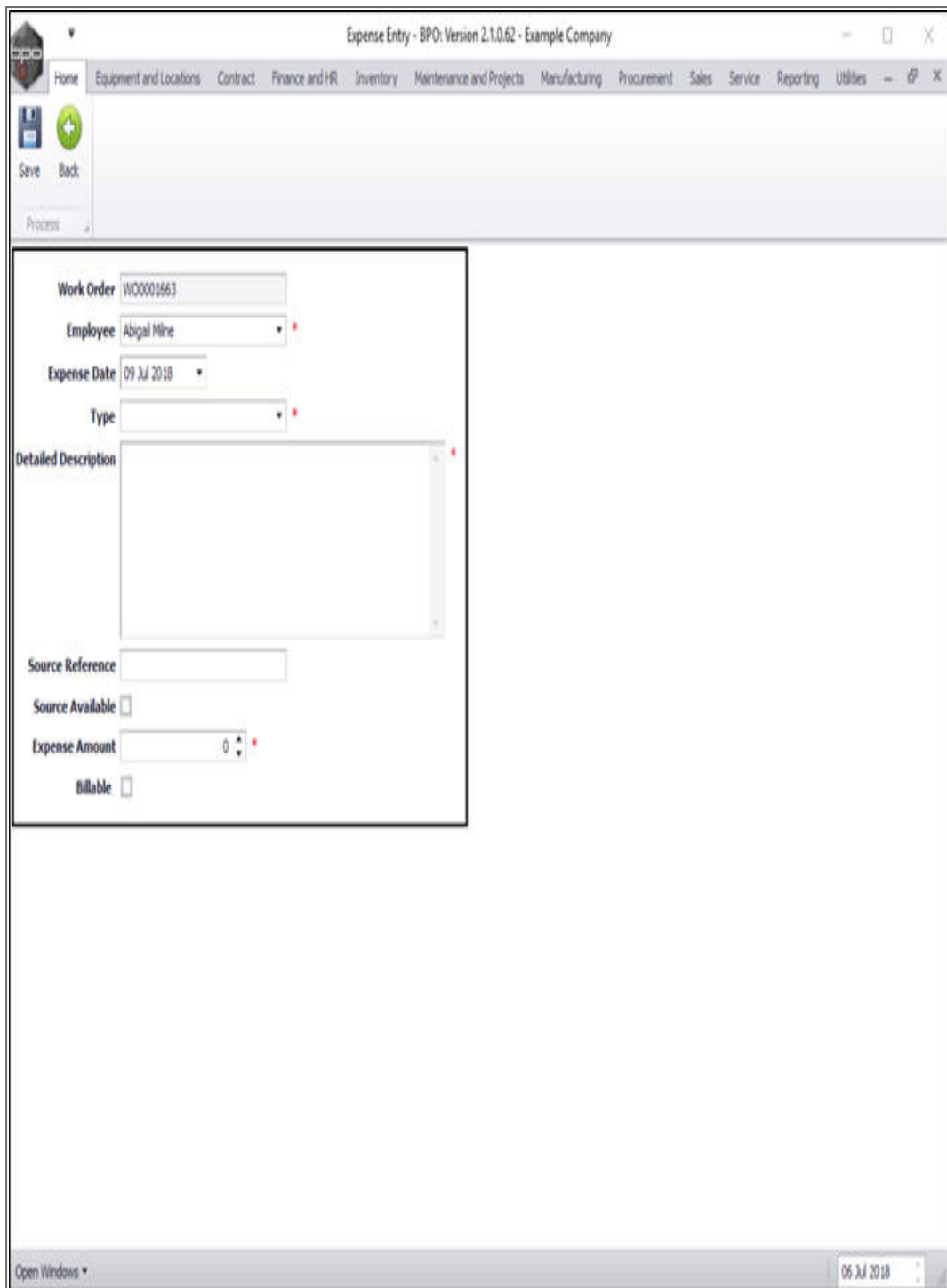
Drag a column header here to group by that column

Fullname	ExpenseDate	ExpenseType	ExpenseTypeDesc	Description	Amount	SourceDocRef	SourceDocAvailable	Billable	Status

Open Windows 06 Jul 2018

The **Expense Entry** screen will be displayed.

- **Work Order:** This will be auto populated with the number of the work order selected in the previous step.
- **Employee Name:** This will be auto populated with the employee linked to the work order selected in the previous step. You can click on the drop-down arrow and select from the list an alternative employee who incurred the expense if required.
- **Expense Date:** This will auto populate with the current date. Either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Type:** Click on the drop-down arrow and select from the list, the type of expense.
 - **Note:** [Additional expense types](#) can be set up, if required.
- **Detailed Description:** Type the in description / reason for the expenses.
- **Source Reference:** Type in the receipt e.g. receipt number if available.
- **Source Available:** Click on this check box if you have the receipt.
- **Amount:** Either type in or use the arrow indicators to select the amount value.
- **Billable:** Click on this check box if this expense should be billable.



The screenshot shows a web application window titled "Expense Entry - BPO: Version 2.1.0.62 - Example Company". The window has a menu bar with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar are icons for Save and Back, and a Process button. The main content area contains a form with the following fields:

- Work Order: WO0001663
- Employee: Abigail Mline
- Expense Date: 09 Jul 2018
- Type: (empty dropdown)
- Detailed Description: (empty text area)
- Source Reference: (empty text field)
- Source Available: ☐
- Expense Amount: 0
- Billable: ☐

At the bottom of the window, there is a status bar with "Open Windows" on the left and a date/time display "06 Jul 2018" on the right.

- When you have finished adding the details to the Expense Entry screen, click on **Save**.

Expense Entry - BPO: Version 2.1.0.62 - Example Company

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

Save Back

Process

Work Order: W00001663

Employee: Abigail Mine

Expense Date: 20 Jun 2018

Type: Toll

Detailed Description: Sutton Toll Plaza to and from client site.

Source Reference: Printed Receipt

Source Available: ☒

Expense Amount: 84

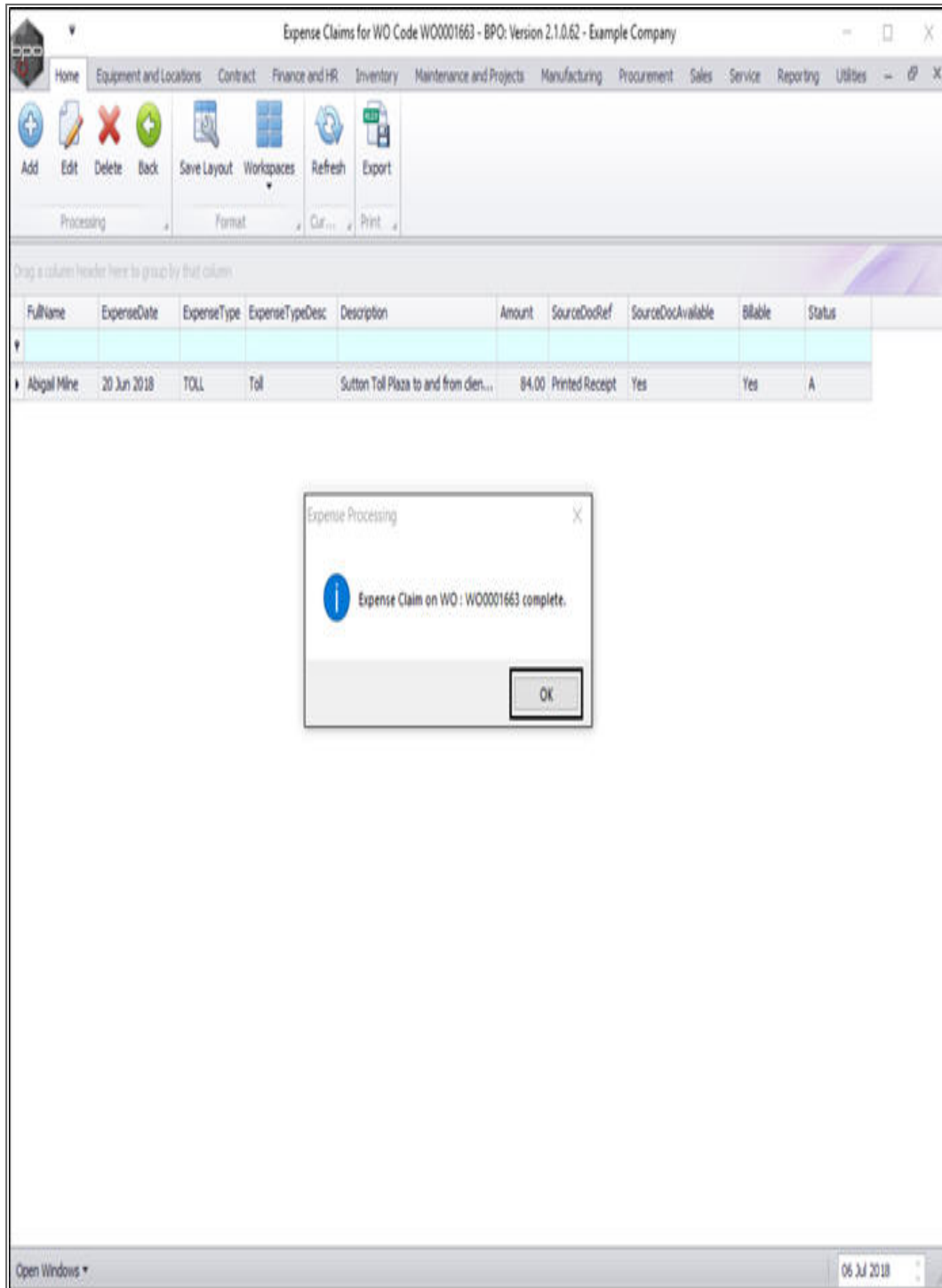
Billable: ☒

Open Windows

06 Jul 2018

- You will return to the **Expense Claims for Work Order Code []** screen.

- An ***Expense Processing*** message box will pop up informing you that;
 - **Expense Claim on WO: [] complete.**
- Click on **OK**.



Expense Claims for WO Code WO0001663 - BPO: Version 2.1.0.62 - Example Company

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

Add Edit Delete Back Save Layout Workspaces Refresh Export

Processing Format Cur... Print

Drag a column header here to group by that column

FullName	ExpenseDate	ExpenseType	ExpenseTypeDesc	Description	Amount	SourceDocRef	SourceDocAvailable	Billable	Status
Abigail Mine	20 Jun 2018	TOLL	Toll	Sutton Toll Plaza to and from dien...	84.00	Printed Receipt	Yes	Yes	A

Expense Processing

Expense Claim on WO : WO0001663 complete.

OK

Open Windows 06 Jul 2018

- You can now view the new expense claim in this screen.

Expense Claims for WO Code W00001663 - BPO: Version 2.1.0.62 - Example Company

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

Add
Edit
Delete
Back
Save Layout
Workspaces
Refresh
Export

Processing
Format
Cur...
Print

Drag a column header here to group by that column

FullName	ExpenseDate	ExpenseType	ExpenseTypeDesc	Description	Amount	SourceDocRef	SourceDocAvailable	Billable	Status
Abigail Mine	20 Jun 2018	TOLL	Toll	Sutton Toll Plaza to and from client site.	84.00	Printed Receipt	Yes	Yes	A

Open Windows
06 Jul 2018

MNU.073.011

