

SERVICE

WORK IN PROGRESS – INVOICE WORK ORDERS

The Work in Progress (WIP) screen displays:

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

but have <u>not yet</u> 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 Asset*s to return the item to the *Asset warehouse*.

Ribbon Access: Service > WIP

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		Equipment	/Locations	Contract	Finance / HR	Inventory	Mainten	ance / Projects	Manufactur	ing Proc	urement	Sales Servio	e Reporting) Utilities		
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Tech I	Мар	Scheduling	Current Tech Activity	Technicians	Availability Exceptions	Site Exceptions	Calls	Call Requests	Work Orders	Service Requests	WIP	Work Management	Time Review	All Open Tickets	My Work	
			Te	chnical						Process				Ticketing	Open W 4	\diamond

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



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Any of these work orders can be invoiced from this screen

- 2. Click on the *row* of the item or service you wish to invoice.
- 3. Click on *Invoice WO*.

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DocNo 🔻	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc
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SI0000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers
	15/03/2022	INVI	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired
	14/01/2022	INVI	INVN	1020-147C	Toner Cyan		1.000	232.143	Yes	WO0006244	2MS - 2 month service
SI0000964	28/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2008	1.000	8,000.000	Yes	WO0006242	1MMS - 1 Month Machine Service
SI0000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	1MMS - 1 Month Machine Service
E SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service
SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service
SI0000963	26/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2009	1.000	8,000.000	Yes	WO0006242	1MMS - 1 Month Machine Service
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	2MS - 2 month service
SI0000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2000	1.000	8,000.000	Yes	WO0006089	2MS - 2 month service
SI0000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	2MS - 2 month service
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	2MS - 2 month service
SI0000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	1MMS - 1 Month Machine Service
E SI0000960	13/12/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	1MMS - 1 Month Machine Service
SI0000959	30/11/2021	INVI	INVN	SP-ABI-T	Sprint Toner Black ABI	AB5001	1.000	250.000	Yes	WO0006089	2MS - 2 month service
SI0000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour	Z101	1.000	3,450.000	Yes	WO0006089	2MS - 2 month service
SI0000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance
E SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test
SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test
SI0000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance

- 4. The Add new Customer Invoice screen will display.
- 5. Complete the *Customer Invoice Header* and the *Financial Header* information.
- 6. Confirm the *Billing and Shipping Addresses*, if these have not populated when you entered the Header information.



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	Salesman	Julanda Kessler		•	•				1	S	Shipping a	ddress				6			
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00	n Windows *												User : 1u	landaK i	3/04/2022	Version : 2.5.0.8	Example Comp	any v2.5.0	8

7. Click on the *Related References* tab to view the related references linked to this invoice.

				Add new	Custome	r Invoice - BPO: Ve	rsion 2.5	.0.8	- Example Co	mpany v2.	5.0.8				_	
Home	Equipment / Loc	cations Co	ontract Fina	ance / HR Inver	ntory N	Maintenance / Projects	Man	ufac	turing Proc	urement	Sales	Service	Reporting Utilit	ties	-	8 X
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Customer Name	Office Supplies Un	limited	* م	Reference	1				ReferenceTyp	e Ÿ	ReferenceN	>				
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SuppressOnPrint	ItemType	ItemCode	ItemDescriptio	on InvoiceLineDe	scription	WarehouseName	BatchSeri	alNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Departmen
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•	Labour	DRV	Driver	Driver					3.000	350.000	15.000	0.000	172.500	172.500	15.000	
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8. The invoice items to be billed will <u>not only</u> be limited to parts and services but will include **all** billable items linked to the work order.



- 9. Click in the *Comments* text box to type in a comment related to the invoice.
- 10. When you have finished editing the details on this screen, click on *Save*.

For a detailed handling of this topic refer to Invoices - Create Sales Invoice (OTC)

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	Tax Rate	15.00 •		15 🗘			Suppr	ess Line Detail on	Print		Addre	sses R	elated Refere	nces					
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		Expenses	ON	Over n	ight stay	Over night sta	y as inst					1.000	750.000	15.000	0.000	862.50	862.500	15.00	0
-		Warranty Select type	12MSW	12 Mor	ith Suppli	12 Month Supp	dier War					1.000	0.000	15.000	0.000	0.00	0.000	15.00	2
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11. You will return to the *Work in Progress* for all work orders screen.

To view the invoice and further invoice processing, refer to Introduction to Sales Invoices.



Work in Progress - Invoice Work Orders

Home	Equipment	/Locations	Contract	Finance / HR	k in Progress for all wo	rk orders - BPC enance / Projects	D: Version 2 Manufa	5.0.8 - Exa	mple Cor Procureme	m pany v2.5.0. nt Sales	8 Service Reporting Utilities	_ D >
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	15/03/2022	INVI	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired	OF
· SI0000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers	HO
⊞ SI0000965	14/01/2022	INVI	INVN	1020-147C	Toner Cyan		1.000	232.143	Yes	WO0006244	2MS - 2 month service	GRI
3 SI00000964	28/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2008	1.000	8,000.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BE4
3 SI0000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
B SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
B SI0000963	26/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2009	1.000	8,000.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
3 SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	2MS - 2 month service	HO
🗉 SI0000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2000	1.000	8,000.000	Yes	WO0006089	2MS - 2 month service	HO
🗄 SI0000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	2MS - 2 month service	HO
B SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	2MS - 2 month service	HO
SI0000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	1MMS - 1 Month Machine Service	
SI0000960	13/12/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
B SI00000959	30/11/2021	INVI	INVN	SP-ABI-T	Sprint Toner Black ABI	AB5001	1.000	250.000	Yes	WO0006089	2MS - 2 month service	HO
🗉 SI00000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour	Z101	1.000	3,450.000	Yes	WO0006089	2MS - 2 month service	HO
SI0000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance	WE
🗉 SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
E SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
C \$100000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	

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