

SERVICE

WORK IN PROGRESS – INVOICE CALL

The Work in Progress (WIP) screen displays:

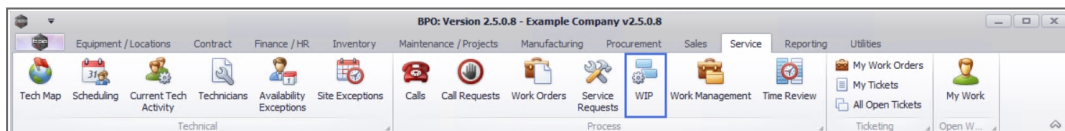
- **Parts** that have been issued or
- **Third Party Services** that have been received

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.
2. Click on the row of the *item* or *service* you wish to invoice



Note that if the item you have selected is linked to a *Call*, the *Invoice Call* button in the ribbon will be activated.

3. Click on **Invoice Call**.

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 WO Invoice Call Invoice Project Back Save Layout Workspaces Refresh Export

Format Curr... Print

2 a column header here to group by that column

DodNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour ...	AD31-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers
SI00000966	15/03/2022	INVI	INVN	2020-998	Staple Unit	d2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired
SI00000965	14/01/2022	INVI	INVN	1020-147C	Toner Cyan		1.000	232.143	Yes	WO0006244	ZMS - 2 month service
SI00000964	28/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2008	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000963	26/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2009	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	ZMS - 2 month service
SI00000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2000	1.000	8,000.000	Yes	WO0006089	ZMS - 2 month service
SI00000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	ZMS - 2 month service
SI00000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	ZMS - 2 month service
SI00000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	IMMS - 1 Month Machine Service
SI00000960	13/12/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000959	30/11/2021	INVI	INVN	SP-AB1-T...	Sprint Toner Black AB1 ...	AB5001	1.000	250.000	Yes	WO0006089	ZMS - 2 month service
SI00000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour ...	Z101	1.000	3,450.000	Yes	WO0006089	ZMS - 2 month service
SI00000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance
SI00000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test
SI00000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test
SI00000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706...	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance

Open Windows

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4. " The Add new Customer Invoice screen will display. " on page 2

You will note that the *Customer Details* would have been populated.

You will need to add a *Reference No.*, as well as search for the correct *Contact Name*, *Billing Customer* and *Billing Contact*, if more than one has been set up for the customer.

5. When you have finished editing the details on this screen, click on **Save**

4 → Add new Customer Invoice - 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

Save Back Delete Item Save Layout Maintain Format

Customer Name: Green Tea Supplies
 Contact Name: Sally April
 Commercial: Discount Commercial
 Salesman: Julanda Kessler
 Billing Customer: Green Tea Supplies
 Invoice Currency: South African Rand
 Tax Rate: 15.00

Reference: New
 Status: New
 Date & Time: 14/04/2022 10:23:46
 Billing Contact: [Select]
 Exchange Rate: 1
☐ Suppress Line Detail on Print

Billing address: PO Box 1892, New Hills
 Shipping address: 95 Dune Road, New Hills, 1234

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department
	Parts	1020-147C	Toner Cyan	Toner Cyan	Main Warehouse		1.000	232.143	0.000	0.000	232.143	232.143	15.000	
	Select type...													

Comment: [Text Area]

Sub Total: 232.14
 VAT: 34.82
 Grand Total: 266.96

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6. 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**.

6 → 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 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

DocId	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc	Custom
SI00000966	15/03/2022	INVT	INVN	2020-998	Staple Unit	4-2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired	OP
SI00000967	15/03/2022	INVT	INVN	SP2020	SP2020 Sprint Colour ...	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers	HO
SI00000964	28/12/2021	INVT	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2008	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEI
SI00000964	28/12/2021	INVT	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEI
SI00000964	28/12/2021	INVT	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEI
SI00000964	28/12/2021	INVT	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEI
SI00000963	26/12/2021	INVT	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2009	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEI
SI00000962	14/12/2021	INVT	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVT	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2000	1.000	8,000.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVT	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVT	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000961	13/12/2021	INVT	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	IMMS - 1 Month Machine Service	BEI
SI00000960	13/12/2021	INVT	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	IMMS - 1 Month Machine Service	BEI
SI00000959	30/11/2021	INVT	INVN	SP-ABI-T...	Sprint Toner Black ABI...	AB5001	1.000	250.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000959	30/11/2021	INVT	INVN	SP2020	SP2020 Sprint Colour ...	Z101	1.000	3,450.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000958	30/11/2021	INVT	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathRmMaint - Bathroom Bin Maintenance	WE
SI00000952	08/11/2021	INVT	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOV2 test	HO
SI00000951	04/11/2021	INVT	INVN	2020-147K	Black toner SP2020	147K-201706...	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	HO
SI00000948	19/10/2021	INVT	INVN	SP220	SP220 Machine	SP2020-0100	1.000	5,000.000	Yes	WO0006135	PRJ408/1	OP

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