

## SERVICE

## WORK IN PROGRESS - INVOICE PROJECT

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 Asset*s to return the item to the *Asset warehouse*.

Ribbon Access: Service > WIP

<del>ت</del> ا						BPC	Version 2.5.0	).8 - Example	Company	/2.5.0.8				_	
	Equipment	/Locations	Contract	Finance / HR	Inventory	Maintena	ance / Projects	Manufactur	ing Proc	urement	Sales Serv	ice Reporting	) Utilities		
٥	31	25	Z	2,	6	6		Ê	X	<b>_</b>	Ê	Ø	My Work Orders	2	
Tech Map	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	
		Ter	thnical		4				Process				Ticketing	Open W 4	$\diamond$

- 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 *Project*, the *Invoice Project* button in the ribbon will be activated.

3. Click on *Invoice Project*.



## Work in Progress - Invoice Project

eturn Invoice I	Equipment	/Locations	Contract	Finance / HR Workspaces	Inventory Mainte Refresh Export	enance / Projects	s Manufa	cturing I	Procureme	ent Sales	Service Reporting Utilities	- 8
Pro	cessing	4	Form	hat ,	Curr d Print d							
g a column heade												
DocNo	EventDa •	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc	CL
ROC	=	R C	R C	8 C	*Dc	a∎c	=	-	P∎C	R C	*D:	8
⊞ SI00000966	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	0
SI0000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers	н
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	В
SI0000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	1MMS - 1 Month Machine Service	B
SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service	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	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	B
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	2MS - 2 month service	H
E \$100000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2000	1.000	8,000.000	Yes	WO0006089	2MS - 2 month service	H
E SI0000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	2MS - 2 month service	H
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	2MS - 2 month service	H
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	E
SI0000959	30/11/2021	INVI	INVN	SP-ABI-T	Sprint Toner Black ABI	AB5001	1.000	250.000	Yes	WO0006089	2MS - 2 month service	H
SI0000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour	Z101	1.000	3,450.000	Yes	WO0006089	2MS - 2 month service	H
I SI0000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance	N N
II SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	H
SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	H
SI0000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	
E ST00000948	19/10/2021	INVI	INVN	SP220	SP220 Machine	SP2020-0100	1.000	5,000.000	Yes	WO0006135	PRJ408/1	C

## 4. The Add new Customer Invoice screen will display.

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 <u>more</u> <u>han one</u> has been set up for the customer.

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



<b>\$ T</b>			4	Add new Custome	r Invoice - BPO: Ve	ersion 2.5.0.8	8 - Example Co	mpany v2.	5.0.8				_	
Home	Equipment / Loc	ations Co	intract Finance	/HR Inventory M	Maintenance / Project	s Manufa	cturing Proc	urement	Sales S	Service	Reporting Utilit	ies	-	8 ×
Save Back I	Velete Tem J	out	$\bigwedge$											\$
Customer Name	Bearing and Shoe	-	2	Reference PRJ408/BS	5001	*	Billing addres	5						
Contact Name		×	4 *	Status New			PO Box 1234 New Town		^ *					
Commercial	Type Class Comme	ercial	/• •	Date & Time 14/04/202	2 • 11:09:27	\$			Ŧ					
Salesman	Julanda Kessler		<u> </u>			1	PO Box 1234	ess	0 .					
Billing Customer	Bearing and Shoe		<u>р</u> • Ві	lling Contact John Bear	ing	• 9	New Town		-					
Invoice Currency	South African Ran	d	▼ Exe	change Rate		1 🗘 *	Forest Hills							
Tax Rate	15.00 -		15 🗘	Suppr	ess Line Detail on	Print	Addresses R	elated Refere	inces					
SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialN	o Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Departmen
P 🔳	-	N <b>O</b> C	a 🗖 c	R C	a 🗖 c	n 🖬 C	-	-	-	-	-	-	-	* <b>0</b> ¢
•	Parts	12-098765	SP19-12 Black T	SP19-12 Black Toner	Main Warehouse		1.000	361.765	0.000	0.000	420.000	420.000	15.000	
	Parts	AM-Copier	AB Marv Multi C	AB Marv Multi Copier 1	George_Whse	AM2009	1.000	8,000.000	15.000	0.000	9,200.000	9,200.000	15.000	
	Parts	ACR-01	Acer copier out	Acer copier outer shell	Main Warehouse	ac34215	1.000	300.000	0.000	0.000	345.000	345.000	15.000	
	Parts	ACR-01	Acer copier out	Acer copier outer shell	Main Warehouse	f1234	1.000	300.000	0.000	0.000	345.000	345.000	15.000	
	Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	11111	3.000	100.000	0.000	0.000	115.000	115.000	15.000	
	Parts	AM-Copier	AB Marv Multi C	AB Marv Multi Copier 1	Main Warehouse	AM2008	1.000	8,000.000	15.000	0.000	9,200.000	9,200.000	15.000	
	select type													
														ł
Comment				<u>^</u>							Sub Tota	1		19,855.00
											VA	r		2,978.25
				Ψ.							Grand Tota	1		22,833.25
Open Windows 🕶								Us	er : Julanda	K 14/04/2	Version : 2.	5.0.8 Example	Company v2	1.5.0.8 //.

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.

turn Invoice WO	Invoice Call Proje	ce Back	Save Layout	Workspaces	Refresh Export							
Pri	ocessing	4	Form	at .	Curr A Print A							
DocNo	EventDa +	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc	Cu
R <b>O</b> C	=	R C	8 C	8 C	* <b>0</b> :	R C	-	-	8 <b>0</b> 4	ROC	a⊡c	-0
	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	H
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	2MS - 2 month service	H
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	H
SI0000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	2MS - 2 month service	н
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	2MS - 2 month service	н
SI0000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	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	H
SI0000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour	Z101	1.000	3,450.000	Yes	WO0006089	2MS - 2 month service	н
E SI0000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance	W
SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	н
SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	н
SI0000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	
SI0000948	19/10/2021	INVI	INVN	SP220	SP220 Machine	SP2020-0100	1.000	5,000.000	Yes	WO0006135	PRJ408/1	0
SI0000948	19/10/2021	INVI	INVN	SP220	SP220 Machine	SP2020-0101	1.000	5,000.000	Yes	WO0006135	PRJ408/1	0
SI0000946	12/10/2021	INVI	INVN	2020-147K	Black toner SP2020		2.000	396.111	Yes	WO0000526	AirMaint - Airfreshner Maintenance	Т
SI0000945	07/10/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006131	1818-1-1 - Check network requirements	н
SI0000943	05/10/2021	INVI	INVN	9855632	Air Freshner		1.000	22.641	No	WO0000371	WS - Weekly Service	
E SI0000944	05/10/2021	INVI	INVN	19-687	Drum	12345	1.000	1,000.000	No	WO0000202	Drum replacement required	н
SI0000941	04/10/2021	INVI	INVN	SP2020	SP2020 Sprint Colour	cheesy1	1.000	4,500.000	Yes	WO0000215	New machine	S

MNU.077.004