

We are currently updating our site; thank you for your patience.

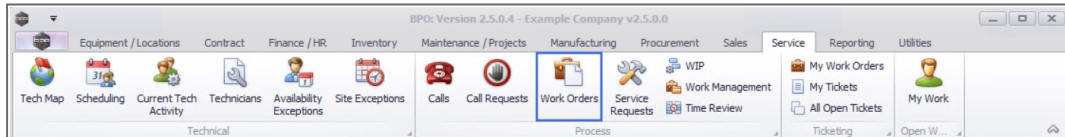
SERVICE

WORK ORDERS – TIME REVIEW

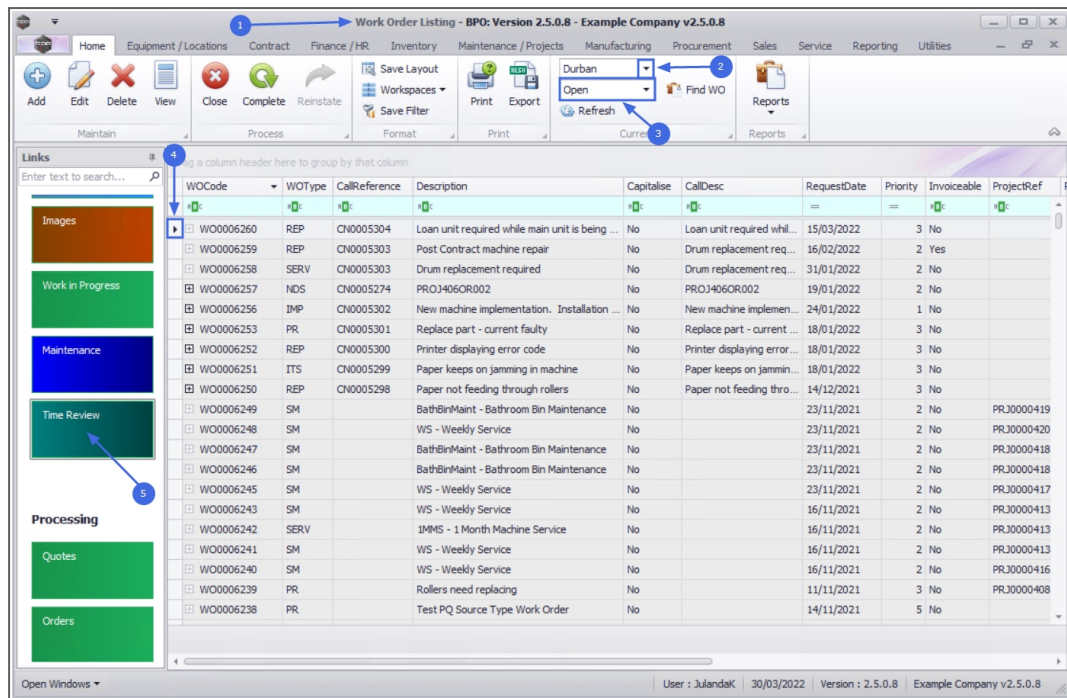
Time review enables managers to allocate **regular** time logged by employees as **SLA** or **non billable** time. For example, if an employee books **4** hours against a work order, and the manager knows that the task should only require **2** hours to complete, then the manager can allocate **2** hours as Billable or **SLA** hours and the remaining **2** hours as **Non Billable** hours in the Time Review screen.

The [Time Review flag](#) must be set to **Yes** in **Configurator**.

Ribbon Access: Service > Work Orders



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** where the work order has been issued.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Select the **row** of the work order you wish to review time for.
5. Click on the **Time Review** tile.



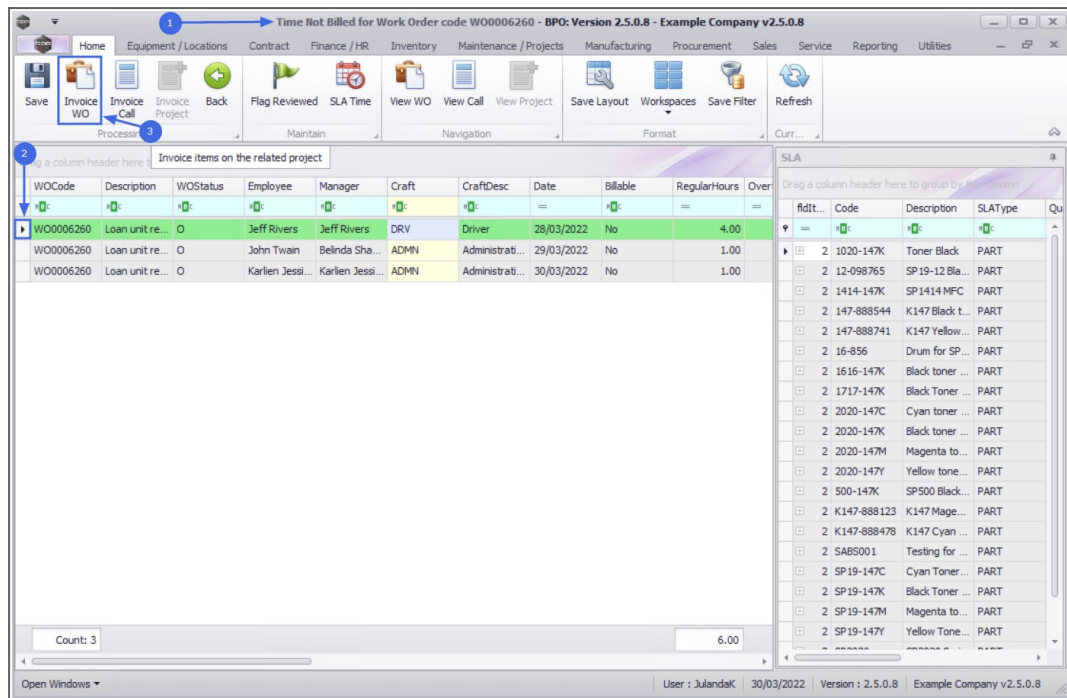
INVOICE WORK ORDER

A work order can be invoiced from the **Time Review** screen.

1. From the **Time Note Billed for Work Order code** [work order code] screen,
2. Click on the **row** of the work order you wish to invoice.
3. Click on **Invoice WO**.



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



4. The **Add New Customer Invoice** screen will be displayed.
5. Complete the Customer Invoice then click on **Save**.



For a detailed handling of this topic refer to [Time Review - Invoice Work Order](#)

1 → 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

2

Customer Name Office Supplies Unlimited Reference
 Contact Name Status New
 Commercial Type Class Commercial Date & Time 30/03/2022 14:26:30
 Salesman Julanda Kessler Billing Contact
 Billing Customer Office Supplies Unlimited Exchange Rate 1
 Invoice Currency South African Rand
 Tax Rate 15.00 15

Suppress Line Detail on Print

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	Ta
	Expenses	TOLL	Marianhill Ridge,...	Marianhill Ridge, Toll to...			1.000	27.000	15.000	0.000	31.050	31.050	
	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500	
	Expenses	TOLL	Marianhill Ridge,...	Marianhill Ridge, Toll to...			1.000	27.000	15.000	0.000	31.050	31.050	
	Expenses	TOLL	Marianhill Ridge,...	Marianhill Ridge, Toll to...			1.000	27.000	15.000	0.000	31.050	31.050	
	Warranty	12MSW	12 Month Suppli...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000	
	Select type...												

Comment

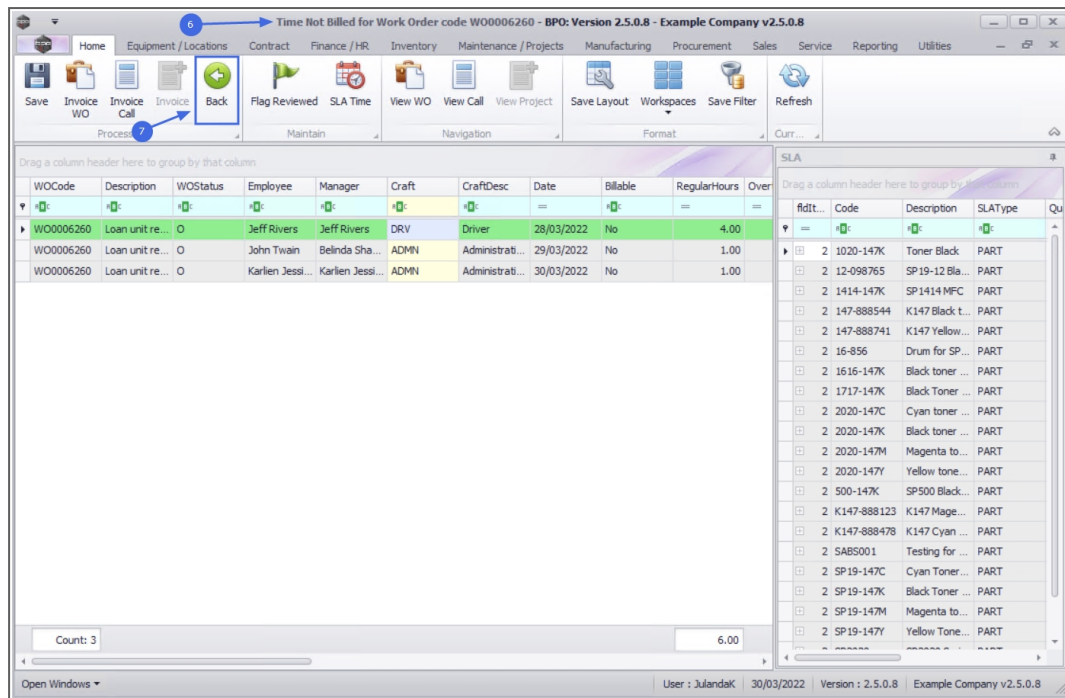
Sub Total 955.65
 VAT 143.35
 Grand Total 1,099.00

Open Windows User: JulandaK 30/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

6. You will return to the **Time Not Billed for Work Order** screen.

7. Click on **Back** to return to the **Work Order Listing** screen.

For a detailed handling of this topic refer to [Introduction to Invoices](#)



INVOICE CALL

1. From the **Time Note Billed for Work Order code** [work order coder]screen,
2. Click on the **row** of the work order you wish to invoice.
3. Click on **Invoice Call**.



Short cut key: Right click to display the **All groups** menu list. Click on **Invoice Call**.

WOCode	Description	WOSStatus	Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	Over
WO0006260	Loan unit re...	O	Jeff Rivers	Jeff Rivers	DRV	Driver	28/03/2022	No	4.00	
WO0006260	Loan unit re...	O	John Tiwain	Belinda Sha...	ADMN	Administrati...	29/03/2022	No	1.00	
WO0006260	Loan unit re...	O	Karlien Jessi...	Karlien Jessi...	ADMN	Administrati...	30/03/2022	No	1.00	

4. The **Add New Customer Invoice** screen will be displayed.

5. Complete the Customer Invoice then click on **Save**.

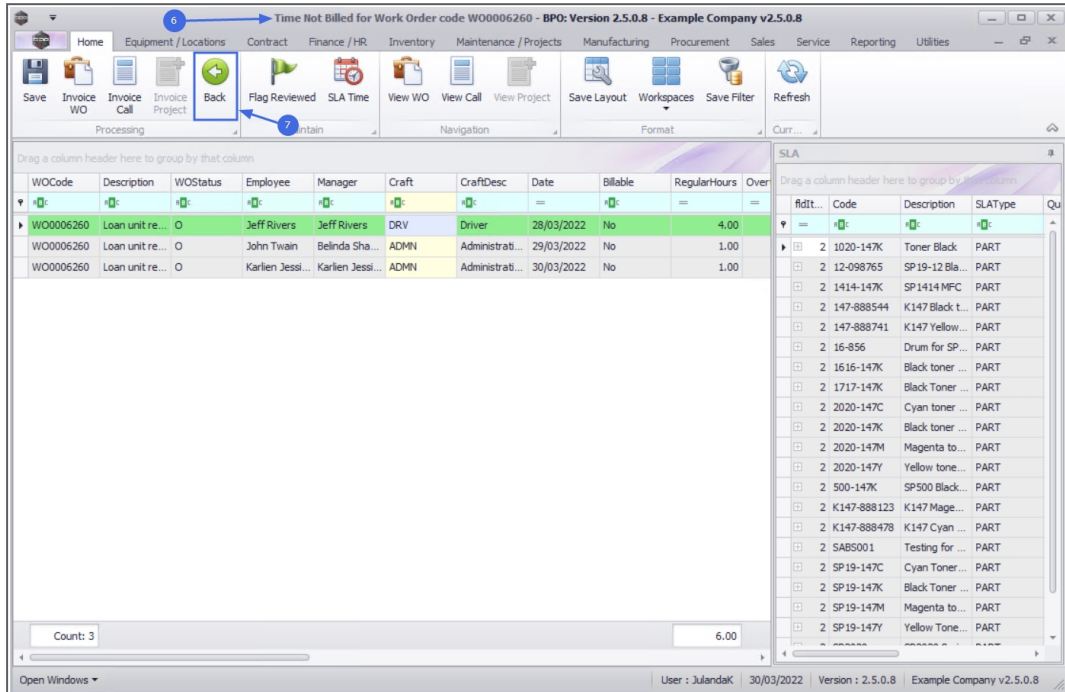
For a detailed handling of this topic refer to [Time Review - Invoice Project](#)

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	Te
	Expenses	TOLL	Marianhill Ridge,...	Marianhill Ridge, Toll to...			1.000	27.000	15.000	0.000	31.050	31.050	
	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500	
	Expenses	TOLL	Marianhill Ridge,...	Marianhill Ridge, Toll to...			1.000	27.000	15.000	0.000	31.050	31.050	
	Expenses	TOLL	Marianhill Ridge,...	Marianhill Ridge, Toll to...			1.000	27.000	15.000	0.000	31.050	31.050	
	Warranty	12MSW	12 Month Suppl...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000	
	Select type...												

6. You will return to the **Time Not Billed for Work Order code** screen.
7. Click on **Back** to return to the Work Order Listing screen.



For a detailed handling of this topic refer to Introduction to Invoices



FLAG REVIEWED

Note on the Time Review flag: Work orders created after the Time Review flag has been set to 'Yes' in the Configurator, will by default display as 'No' in the Billable column, yet all Regular Hours will be billed.

1. From the **Time Not Billed for Work Order code** [work order code] screen,
2. Click on the **row** of the Work Order you wish to review the time for.

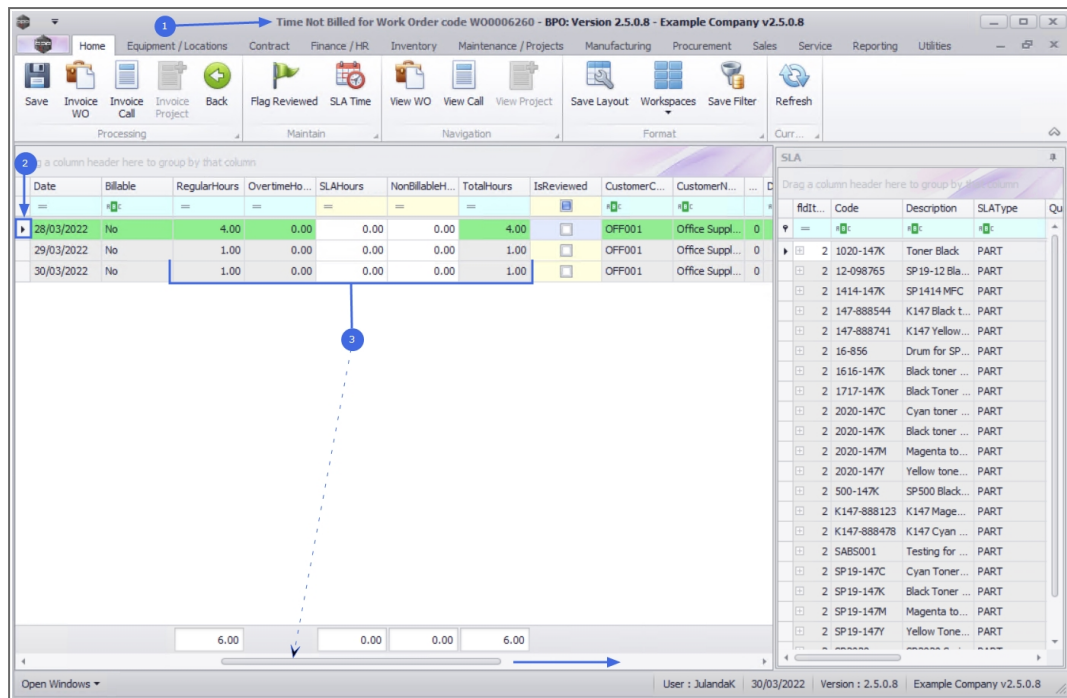
3. **Scroll** until you can view all the Time columns.

- **Billable:** Labour time is displayed as billable or non-billable.
- **Regular Hours:** The time logged against the work order.
(This field cannot be changed)
- **Overtime¹ Hours:** Overtime hours logged against the work order. (This field cannot be changed)
- **SLA Hours:²** Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
- **Non Billable Hours:³** Time allocated to this field will not be billed.
- **Total Hours:** = *Regular Hours + Overtime Hours + SLA Hours + Non Billable Hours*. (This field cannot be changed)

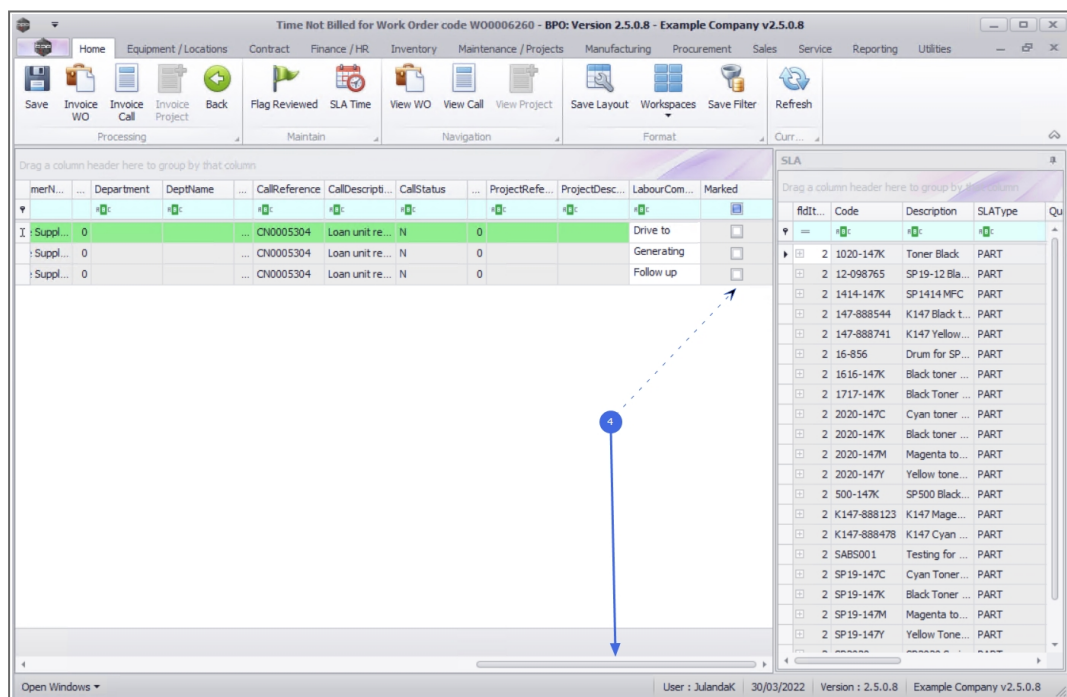
¹Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.

²Time allocated to SLA hours will be deducted from Regular Hours. For example 8 Regular Hours booked, will be updated to 7 Regular Hours when you add 1 to the SLA Hours field.

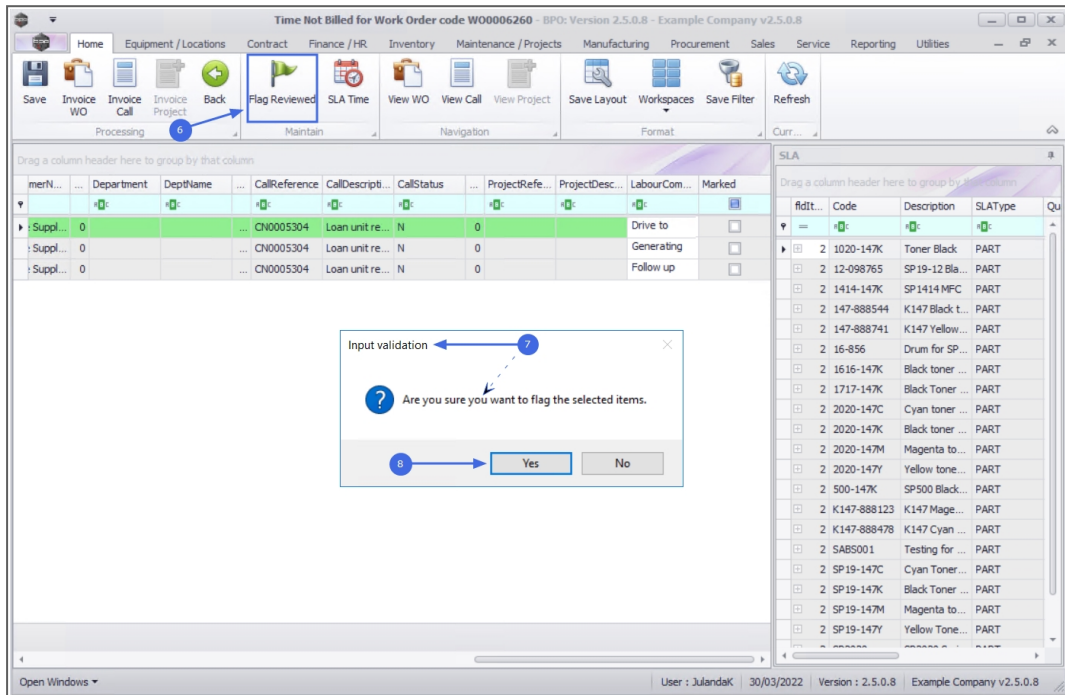
³Adding Non Billable hours will deduct from Regular hours



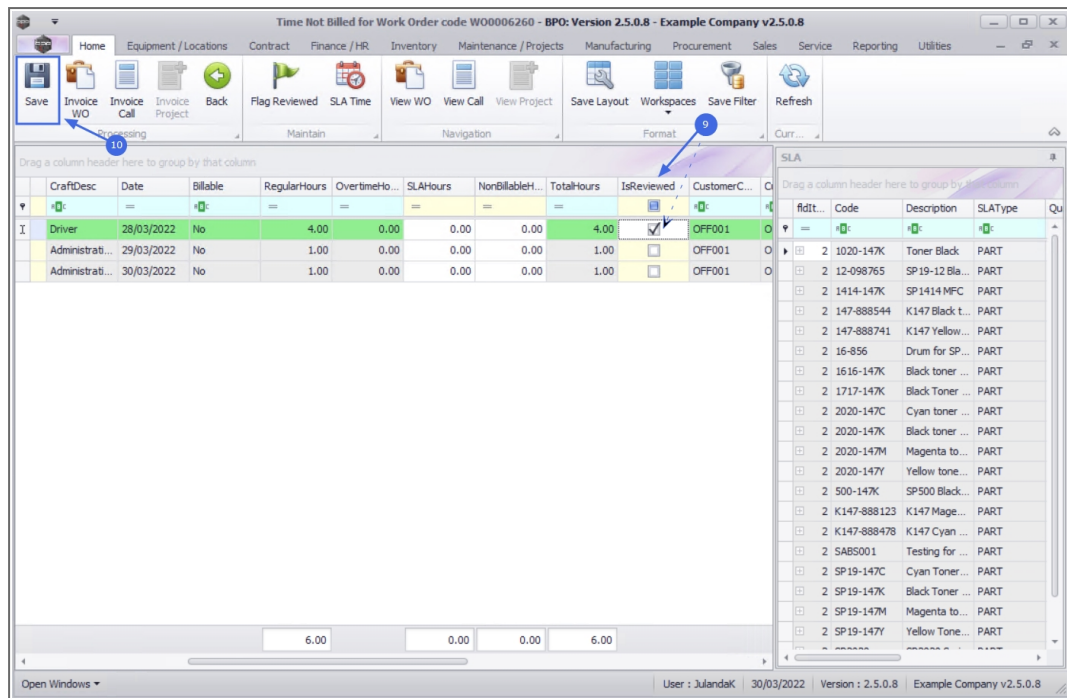
4. **Scroll** right until you can view the **Marked** column.
5. The Marked field for the work order will be checked when time is allocated to **SLA and/or Non Billable Hours**.



6. Click on **Flag Reviewed**, when you have completed reviewing the time for the work order.
7. When you receive the *Input Validation* message to confirm;
 - *Are you sure you want to flag the following items.*
8. Click on **Yes**.



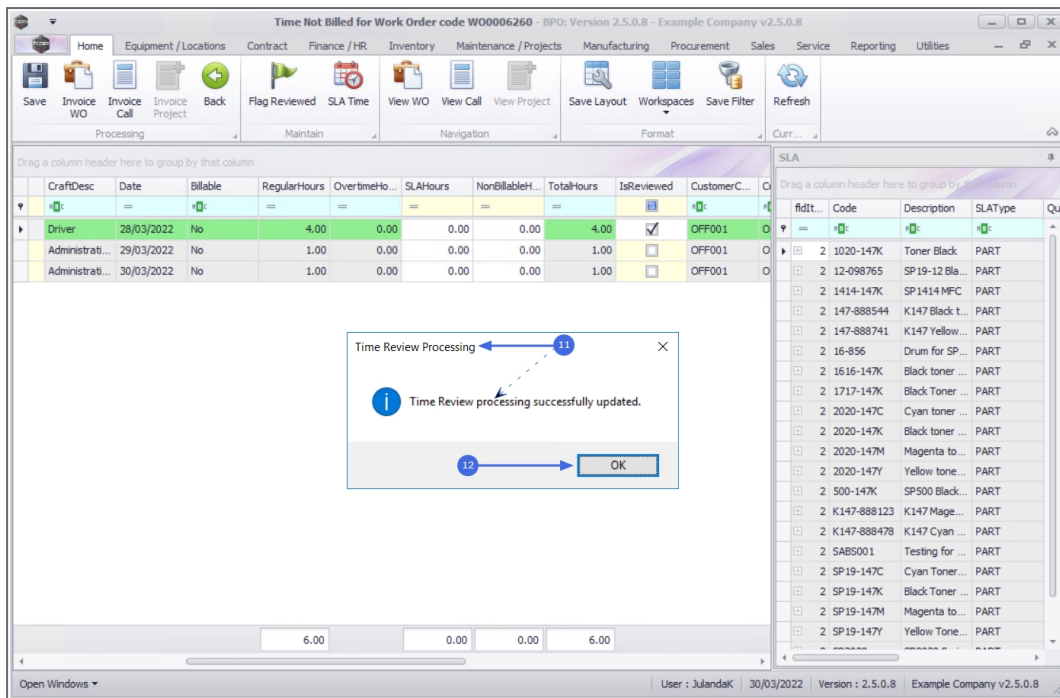
9. The *Is Reviewed* field will now be checked.
10. Click on **Save**.



11. When you receive the *Time Review Processing* message to confirm;
 - *Time Review processing successfully updated.*
12. Click on **OK**.



Note that for a record to be removed from this screen, the Work Order has to be closed.



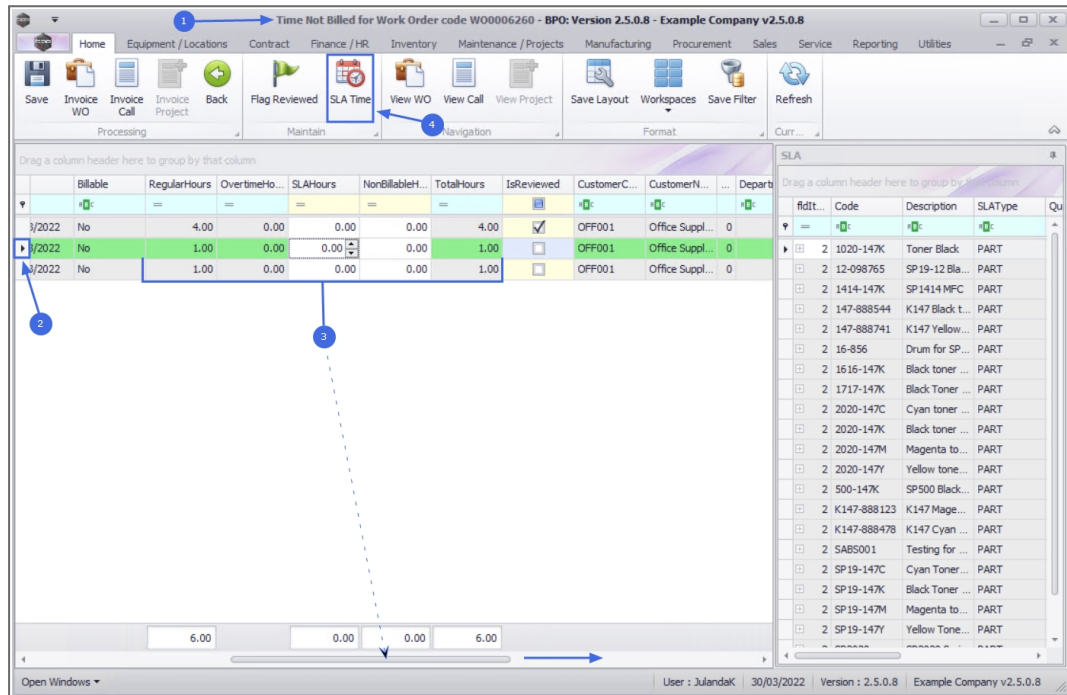
SLA TIME

SLA¹ is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. Failing which, the client can receive compensation of a pre-agreed type (usually also set up in the SLA).

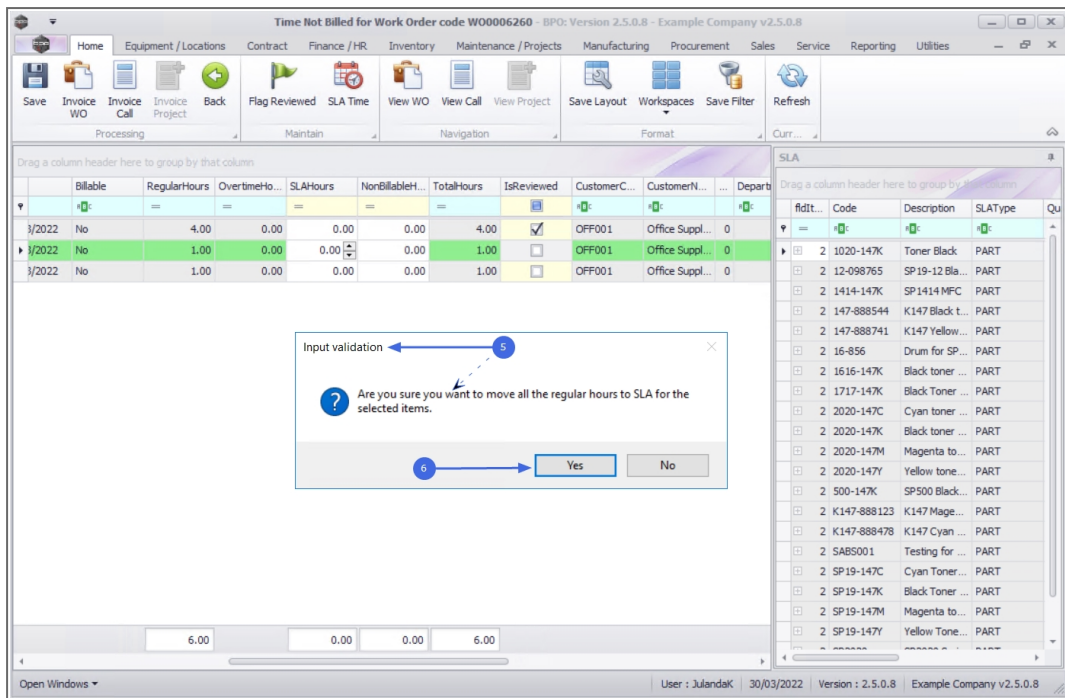
1. From the **Time Not Billed for Work Order code** [work order number] screen will be displayed.

¹This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).

- Click on the **row(s)** to select the Work Order(s) you would like to adjust Regular Hours booked, to SLA Time.
 - Any [contract inclusions](#) linked to an item on the selected work order will be displayed in the SLA section.
- Use the **scroll bar** to scroll until you are able to see the hours booked for the Work Order(s).
- Click on **SLA Time** to convert the Regular Hours to SLA Hours.



- When you receive the **Input validation** message to confirm;
 - Are you sure you want to move all the regular hours to SLA for the selected items.
- Click on **Yes**.

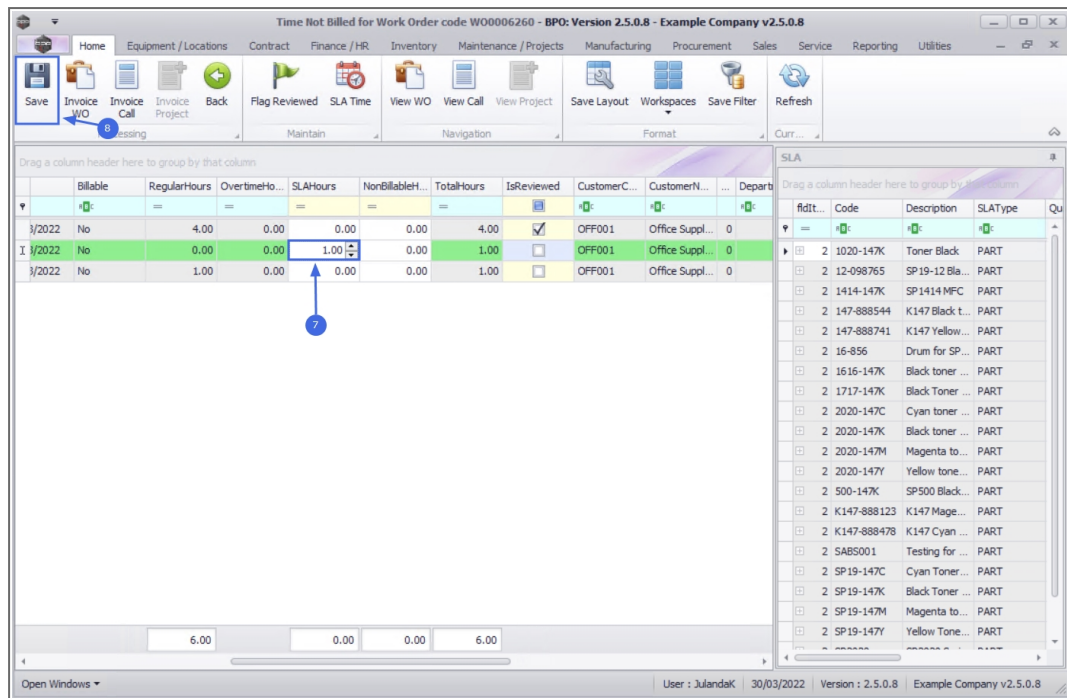


7. The selected **work order(s)** have been updated and the Regular Hours have been moved or added to the SLA Hours.



Note that only Regular Hours have been moved. Overtime and Non-Billable Hours were not affected.

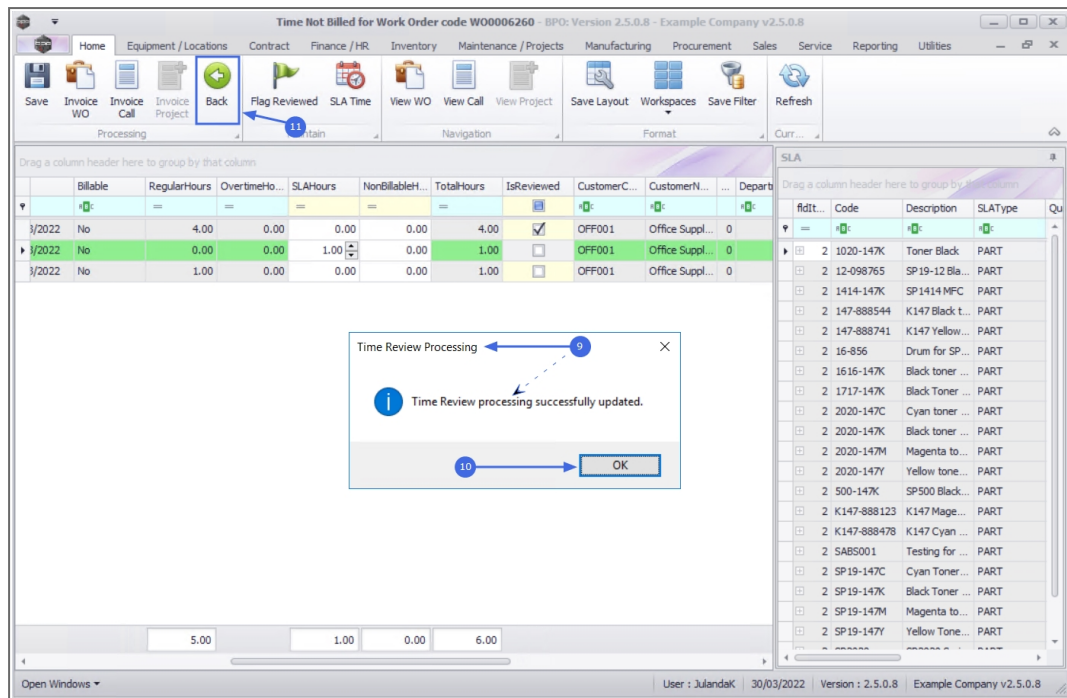
8. Click on **Save** to save the changes.



	Billable	RegularHours	OvertimeHours	SLAHours	NonBillableHours	TotalHours	IsReviewed	CustomerCode	CustomerName	Department
3/2022	No	4.00	0.00	0.00	0.00	4.00	<input checked="" type="checkbox"/>	OFF001	Office Suppl...	0
I 3/2022	No	0.00	0.00	1.00	0.00	1.00	<input type="checkbox"/>	OFF001	Office Suppl...	0
3/2022	No	1.00	0.00	0.00	0.00	1.00	<input type="checkbox"/>	OFF001	Office Suppl...	0

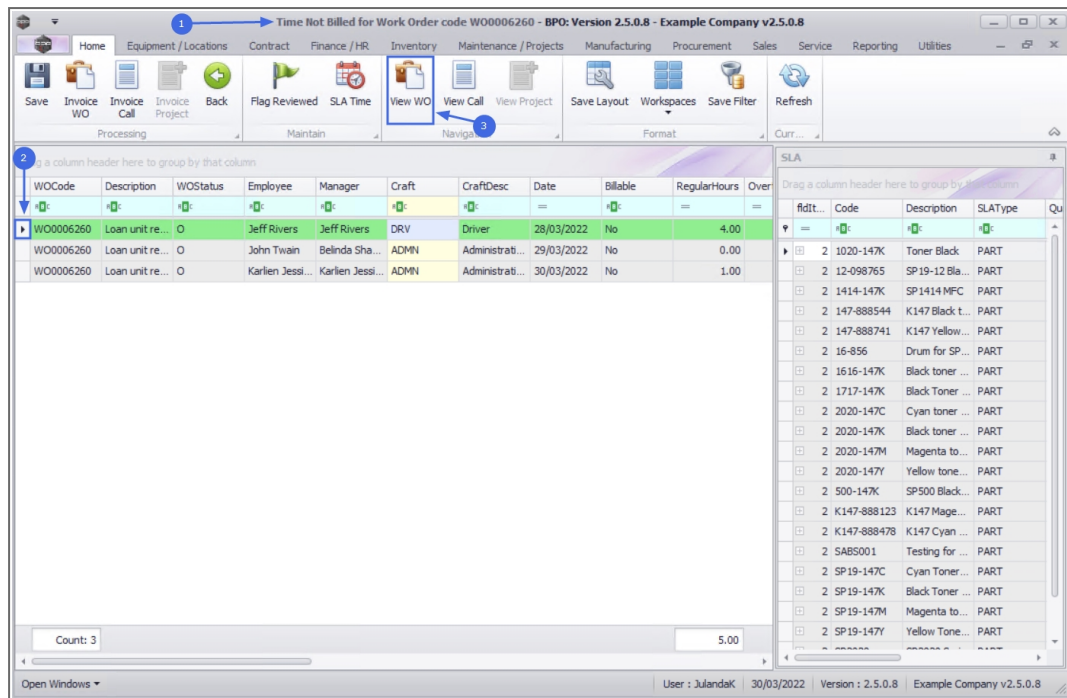
Item	Code	Description	SLAType	Quantity
2	1020-147K	Toner Black	PART	
2	12-098765	SP 19-12 Bla...	PART	
2	1414-147K	SP 1414 MFC	PART	
2	147-888544	K147 Black t...	PART	
2	147-888741	K147 Yellow...	PART	
2	16-856	Drum for SP ...	PART	
2	1616-147K	Black toner ...	PART	
2	1717-147K	Black Toner ...	PART	
2	2020-147C	Cyan toner ...	PART	
2	2020-147K	Black toner ...	PART	
2	2020-147M	Magenta to...	PART	
2	2020-147Y	Yellow tone...	PART	
2	500-147K	SP500 Black...	PART	
2	K147-888123	K147 Mage...	PART	
2	K147-888478	K147 Cyan ...	PART	
2	SAB5001	Testing for ...	PART	
2	SP 19-147C	Cyan Toner...	PART	
2	SP 19-147K	Black Toner ...	PART	
2	SP 19-147M	Magenta to...	PART	
2	SP 19-147Y	Yellow Tone...	PART	

9. When you receive the **Time Review Processing** message to confirm;
 - **Time Review processing successfully updated.**
10. Click on **OK** to confirm.
11. Click on **Back** to return to the Work Order Listing screen.



VIEW WORK ORDER

1. From the **Time Not Billed for Work Order code** [work order number] screen,
2. Click on the **row** of the Work Order you wish to view.
3. Click on **View WO**.



4. " The Work Order Maintenance screen will be displayed. " on page 2
5. From here you can add to or edit the **Work Order** details, **Customer Info**, the **Required Crafts**, **Additional Data** or the **Equipment Info** for the work order, or update the work order using the **Function** and **Processing** tiles.
6. When you have completed making the changes to the maintenance screen, click on **Save**.

Maintain WO - Ref WO0006260 - 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 Save Layout Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Description Loan unit required while main unit is being repaired

Requestor David Rowe

WO Type Repair

Priority 3

Request Date 15/03/2022 10:30:02

Status Open

Billable

Capitalise

Work Order Item:

Functional Location Equipment

Item 1912-102035

Comment

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CN0005304
PMNG	Project Reference	

Schedule:

Assigned To Ben Johnson

Assigned By Bianca Du Toit

Scheduled Start 15/03/2022 00:00:00

Scheduled End 16/03/2022 00:00:00

Actual Start 14/04/2022 12:00:00

Actual End 14/04/2022 12:00:00

Delay Comments Currently on Schedule

Rectification Code

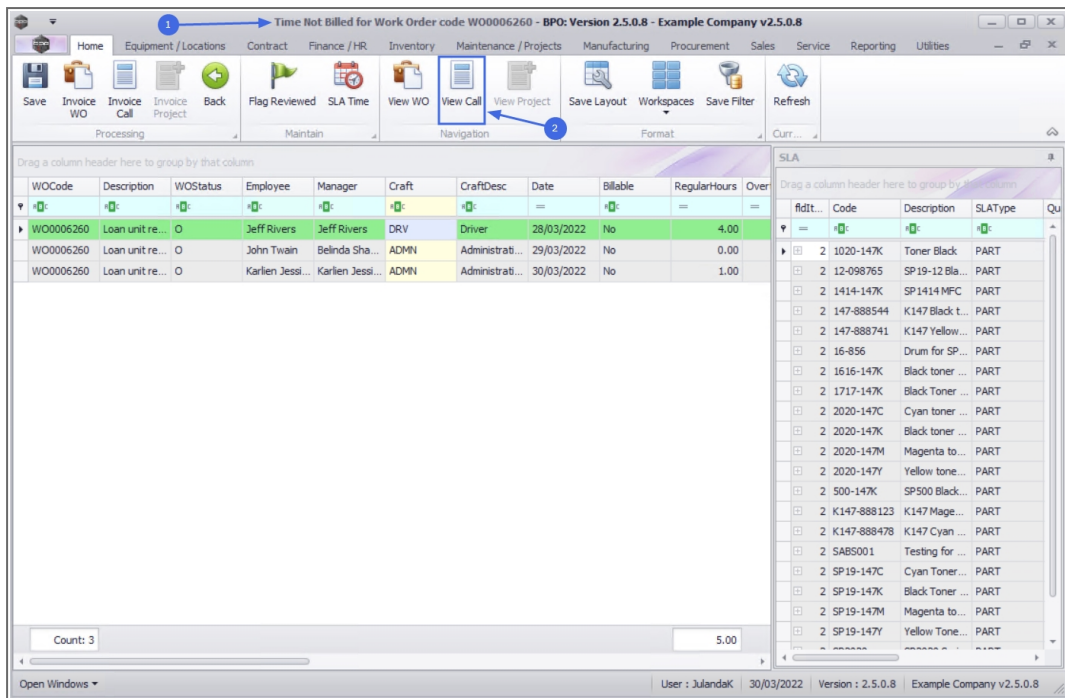
Rectification Comments

Completion Date 14/04/2022 12:00:00

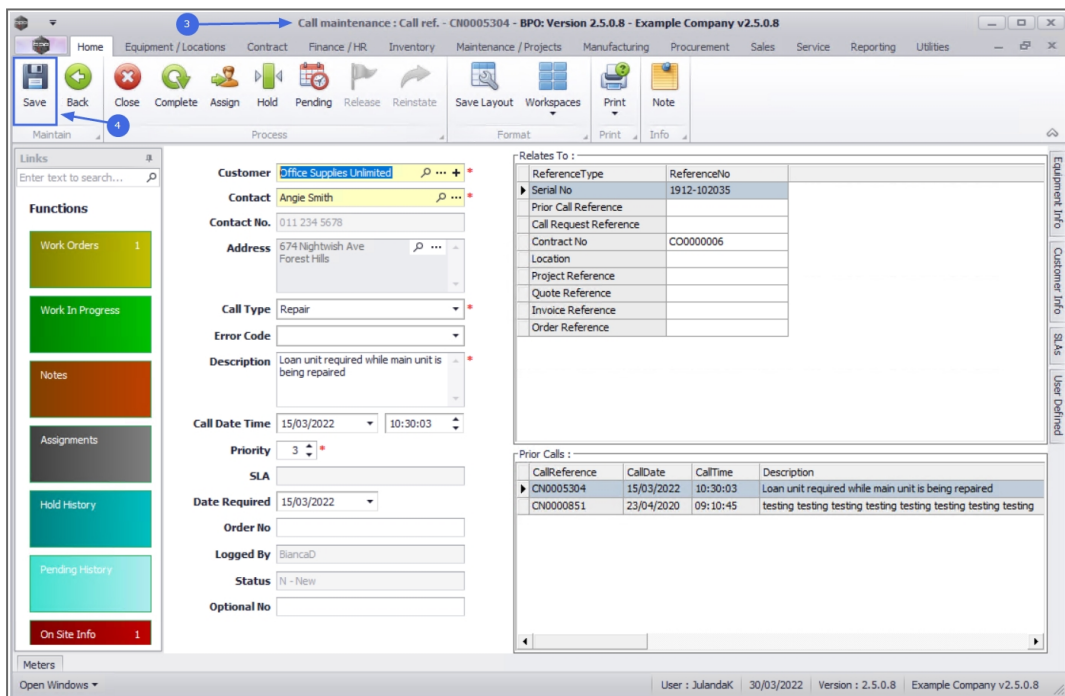
User : JulandaK 30/03/2022 Version : 2.5.0.8 Example Company v2.5.0.8

VIEW CALL

1. From the **Time Not Billed for Work Order code** [work order number] screen,
2. Click on **View Call**.



3. "The Call maintenance screen will be displayed." on page 4
4. Make the required changes to the call information and click on **Save**.



MNU.072.020

