

SERVICE

INTRODUCTION TO WORK IN PROGRESS (WIP)

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



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





f the items/services are *billable*, then it is an indication that they nave not vet been invoiced.

f the items are *non billable*, then it is an indication that the linked work order, call or project has not yet been closed.

WIP DATA GRID

- 2. In the *Doc No* column,
- 3. a **part** WIP record is displayed as a *document number*, for example *SI00001000*
- 4. and a service WIP record is displayed as SERVICE.

Home	Equipment	/Locations	Contract	Finance / HR	Inventory	Maintenance / Proj	jects Manufa	cturing	Procureme	ent Sales	Service	Reporting	Utilities	-	- 2	
		e Back	Save Layout	Workspaces		port										
WO	Call Proje	ct		+												
2 Pro	cessing	4	Form	iat .	Curr J Pri	nt 🔺										
ag a colunn head																
DocNo	EventDa 🕶	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc					
1 C	-	R O C	n C	n 🗖 C	a 🗖 c	R C	-	-	n o c	# C	R O C					
	01/08/2017	INVI	INVN	A4P	A4 Paper	20170731	1.000	0.000	Yes	WO0001493	Test edit o	all linked to ass	et - edit and si	ave should kee	p WOD)ef
SI0000676	14/07/2017		INVN	2020-147C	Cyan toner SP2	020	1.000	450.000	Yes	WO0001528	Work Orde	er Linked to an	asset			
SI0000675	14/07/2017	9	INVN	2020-147C	Cyan toner SP2	020	1.000	450.000	Yes	WO0000680	Work orde	r with serial nu	mber			
SI0000665	07/07/2017	INVI	INVN	1616-147K	Black toner SP16	20170707	1.000	350.000	No	WO0001523	523 Test creating a call with the required date field filled					
∃ SI0000664	06/07/2017	INVI	INVN	1020-147K	Toner Black		1.000	351.923	Yes	WO0001412	12 Test saving a call linked to a serial number to see if t				re is st	đ
SERVICE	04/07/2017	•	CTRT	CALL	Call Out Fee		1.000	150.000	No	WO0001519	19 PRJ - Loan Units Processing					
SERVICE	04/07/2017		CTRT	DES	Design consultat	tion	1.000	500.000	No	WO0001460	60 SP1912_NDS_2 - Network configuration					
SI00000658	30/06/2017	INVI	INVN	204-147C	SP204 Cyan Ton	ier	1.000	350.000	No	WO0001513	13 Issued and invoiced stock					
SI0000643	20/06/2017	INVI	INVN	SP2020	SP2020 Sprint C	olour	1.000	4,500.000	No	WO0001495	Test call fo	or swap out - in	ternal asset sv	vap		
SI0000642	20/06/2017	INVI	INVN	SP 19 19	SP 1919 Sprint C	olour cvb123	1.000	3,800.000	No	WO0001495	Test call fo	or swap out - in	ternal asset sv	vap		
SI0000638	19/06/2017	INVI	INVN	204-147C	SP204 Cyan Ton	ier	1.000	350.000	Yes	WO0001057	Call linked	to BOM item				
SERVICE	15/06/2017	WOCT	CTRT	INST	Installation Fee		1.000	500.000	No	WO0001477	Test CrNo	te Totals for Pri	icing by TypeCl	lass commercia	I	
SI0000632	09/06/2017	INVI	INVN	12-098765	SP 19-12 Black T	oner	1.000	361.765	Yes	WO0001459	SP1912_N	DS_1 - Machine	installation			
SI0000624	01/06/2017	INVI	INVN	2020-147C	Cyan toner SP2	020	1.000	450.000	No	WO0001439	Quick Part	Return - Loan	unit			
SI0000623	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-8594	1.000	5,000.000	No	WO0001439	Quick Part	Return - Loan	unit			
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-9058	1.000	5,000.000	Yes	WO0001438	Quick part	return - invoice	ed			
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-6398	1.000	5,000.000	Yes	WO0001438	Quick part	return - invoice	ed			
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-4585	1.000	5,000.000	Yes	WO0001438	Quick part	return - invoice	ed			
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-0698	1.000	5,000.000	Yes	WO0001438	Quick part	return - invoici	ed			
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-7659	1.000	5,000.000	Yes	WO0001438	Quick part	return - invoice	ed			
\$100000626	01/06/2017	TNINT	TNIVN	CD 19 19	Sprint conier	1818-0671	1 000	5 000 000	Vec	W/00001439	Ouid nart	return - invoio	ed.			

PROCESSING ACTION BUTTONS

From this screen, you can:

- Return an item or service using the *<u>Return</u>* button.
- Invoice a work order using the *Invoice WO* button.

Help v2.5.0.14 - Pg 2 - Printed: 25/06/2024



- Invoice a call using the *Invoice Call* button.
- Invoice a project using the *Invoice Project* button.

Home	Equipment		Contract	Finance / HR Workspaces	Inventory Maint	enance / Projec	ts Manufa	country 1	Procureme	ent Sales	Service Reporting Utilities — 67
ag a 🛃		2			rr a Print a						
Doct	_	_			nDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc
Return	Invo	pice	Invoice	Invoic	e	A D C	-	-	n O C	(0)	10:
E S	W	0	Call	Projec	t Paper	20170731	1.000	0.000	Yes	WO0001493	Test edit call linked to asset - edit and save should keep WO
S10000070	14/07/2017	TIAAT	TLAALA	2020-1470	cyan toner SP2020		1.000	450.000	Yes	WO0001528	Work Order Linked to an asset
SI0000675	14/07/2017	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	Yes	WO0000680	Work order with serial number
SI0000665	07/07/2017	INVI	INVN	1616-147K	Black toner SP1616	20170707	1.000	350.000	No	WO0001523	Test creating a call with the required date field filled in.
E SI00000664	06/07/2017	INVI	INVN	1020-147K	Toner Black		1.000	351.923	Yes	WO0001412	Test saving a call linked to a serial number to see if there is s
SERVICE	04/07/2017	WOCT	CTRT	CALL	Call Out Fee		1.000	150.000	No	WO0001519	PRJ - Loan Units Processing
SERVICE	04/07/2017	WOCT	CTRT	DES	Design consultation		1.000	500.000	No	WO0001460	SP1912_NDS_2 - Network configuration
SI0000658	30/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	No	WO0001513	Issued and invoiced stock
SI0000643	20/06/2017	INVI	INVN	SP2020	SP2020 Sprint Colour		1.000	4,500.000	No	WO0001495	Test call for swap out - internal asset swap
SI0000642	20/06/2017	INVI	INVN	SP 19 19	SP 19 19 Sprint Colour	cvb123	1.000	3,800.000	No	WO0001495	Test call for swap out - internal asset swap
SI0000638	19/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	Yes	WO0001057	Call linked to BOM item
SERVICE	15/06/2017	WOCT	CTRT	INST	Installation Fee		1.000	500.000	No	WO0001477	Test CrNote Totals for Pricing by TypeClass commercial
SI0000632	09/06/2017	INVI	INVN	12-098765	SP 19-12 Black Toner		1.000	361.765	Yes	WO0001459	SP1912_NDS_1 - Machine installation
SI0000624	01/06/2017	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	No	WO0001439	Quick Part Return - Loan unit
SI0000623	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-8594	1.000	5,000.000	No	WO0001439	Quick Part Return - Loan unit
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-9058	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-6398	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-4585	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-0698	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-7659	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
\$10000626	01/06/2017	TNINT	TNUN	CD 18 18	Sprint conier	1818-0671	1 000	5 000 000	Vec	W/00001439	Ouide nart ration - invoiced

EXPORT

- 1. You can choose to export a list of **all** the Work in Progress records,
- 2. or a *selected list*, by refining the list by filtering the data grid using the filter row.
- 3. Click on *Export*.



Introduction to Work in Progress (WIP)

₽ . .				Work in	n Progress for all wo	ork orders - BPO: V	ersion 2.5.0	.8 - Examp	ole Compa	ny v2.5.0.8				_		
Home	Equipment	/Locations	Contract	Finance / HR	Inventory M	aintenance / Projects	Manufa	cturing	Procuremen	nt Sales	Service	Reporting	Utilities		- 8	2
s 🗈		6	2													
eturn Invoice WO	Invoice Invoi Call Proje		Save Layout	Workspaces	Refresh Export											
	rocessing		Form	at	Curr. Print	1										
		-				lied Filter : Contai	ns([ItemTy	ne]. '(T')								
								p=1) ==)								
			_												1	
DocNo	EventDa		ItemType 1		ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc					
• D ¢	-	R C	RE: CT	A D C	8 🗖 C	R C	-	-	8 🗖 C	* 0 0	R C					
SERVICE	19/11/2015		CTRT	INST	Installation Fee		2.000	500.000		WO0000662		ntract Detail re		fter partial no	in stock i	ret
SERVICE	18/11/2015	WOCT	CTRT	DEL	Delivery Fee		2.000	800.000		WO0000653	Test non s	stock grns - pa	rtial receipts			
SERVICE	18/11/2015	WOCT `	CTRT	DEL	Delivery Fee		1.000	500.000	No	WO0000653	Test non s	stock grns - pa	rtial receipts			
SERVICE	18/11/2015	WOCT	CTRT	TOLL	Toll Fee		3.000	1,500.000	No	WO0000655	55 Non stock partial supplier debit notes test					
SERVICE	18/11/2015	WOCT	CTRT	TOLL	Toll Fee		1.000	1,000.000	Yes	WO0000655	55 Non stock partial supplier debit notes test					
SERVICE	18/11/2015	WOCT	CTRT	TOLL	Toll Fee		3.000	500.000	No	WO0000655	5 Non stock partial supplier debit notes test					
SERVICE	18/11/2015	WOCT	CTRT	INST	Installation Fee		1.000	500.000	No	WO0000662	2 Check Contract Detail record in place after partial non st					
SERVICE	18/11/2015	WOCT	CTRT	CALL	Call Out Fee		3.000	1,000.000	No	WO0000657	Test parti	al non stock pr	ocurement - ea	dit costs		
SERVICE	18/11/2015	WOCT	CTRT	CALL	Call Out Fee		2.000	650.000	No	WO0000657	Test parti	al non stock pr	ocurement - ea	dit costs		
SERVICE	17/11/2015	WOCT	CTRT	TOLL	Toll Fee		1.000	125.000	No	WO0000650	test multi	line subcontrac	t same ctrt pa	rtial grn		
SERVICE	05/11/2015	WOCT	CTRT	INST	Installation Fee		2.000	500.000	Yes	WO0000616	SP240-3 -	Documentatio	n			
SERVICE	05/11/2015	WOCT	CTRT	DEL	Delivery Fee		1.000	250.000	Yes	WO0000614	SP240-1 -	Machine Insta	lation			
SERVICE	26/02/2015	WOCT	CTRT	INST	Installation Fee		1.000	1,250.000	No	WO0000459	Set up ner	w email addres	ses			
SERVICE	23/09/2014	WOCT	CTRT	CALL	Call Out Fee		1.000	750.000	Yes	WO0000242	Toner for	delivery to die	nt			
SERVICE	21/07/2014	WOCT	CTRT	DEA	Dealer Service Fee		1.000	950.000	Yes	WO0000185	Machine r	epair needed				
SERVICE	21/07/2014	WOCT	CTRT	DEA	Dealer Service Fee		1.000	950.000	Yes	WO0000183	Service m	achine S/N: 19	12-102036			
SERVICE	21/07/2014	WOCT	CTRT	TRA	Employee Training		1.000	850.000	Yes	WO0000182	Machine e	error code - ser	vice - 1250			
SERVICE	04/07/2014	WOCT	CTRT	DEL	Delivery Fee		1.000	250.000	No	WO0000173	SP1912_N	IDS_1 - Machin	e installation			
x Contains([]	temType] (CT)														Edit	+ 5
- Contains([)	wini ypej, ci j									er : JulandaK		2 Version : 2		nple Company		-

- 4. The list of Work in Progress records will display be exported to an *Excel spreadsheet*.
- 5. Make the necessary *changes* to the spreadsheet, *save* and *print* from Excel, as required.
- 6. *Close* the screen to return to the Work In Progress for all work orders screen.

₽ 5°∂°	÷	4		> Work	in Progress for all work	orders_12-#	Apr-20)22_01-29-5	7 - Excel		Julanda Kes	sler 🔼	☞ -	
File Home	Insert Page Li	ayout Form	ulas Data	Review	View Help Tear	n 🖓 1	Tell m	e what you	want to do				6	A Share
Paste v B			A =	≡ ≡ ≫ ≡ ≡ €			€.0 . .00 ∎		itional Forma itting ~ Table Styles			te 👻 💵		t Y
				Alignmer	L (2)	Number		121	Styles		Cel	5	Eulung	/
A1 ~	I × ✓	fx DocN	lo											,
A	В	C	D	E	F 5	G		н	1	J	К			L [
1 DocNo 💌	EventDate 💌	SourceTyp -	ItemTyp -	ItemCod -	ItemDesc 🔹	BatchNo	-	Quantit 👻	UnitCost 💌	Billab 👻	WOCode 🝷	WODesc		
2 SERVICE	07/05/2020	WOCT	CTRT	TRA	Employee Training			1.000	650.000	Yes	WO0000135	SP19-12IR -	SP19-12 Inhous	e Rental
3 SERVICE	03/09/2018	WOCT	CTRT	CALL	Call Out Fee			1.000	150.000	Yes	WO0002210	SP1912_ND	S_2 - Network (onfiguratio
4 SERVICE	11/07/2018	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0002241	Auto Invoic	ing Next Level	
5 SERVICE	30/05/2018	WOCT	CTRT	CALL	Call Out Fee			1.000	150.000	No	WO0002196	Create a ca	ll to test the me	ter reading
6 SERVICE	29/05/2018	WOCT	CTRT	INST	Installation Fee			1.000	1,250.000	Yes	WO0002202	1234		
7 SERVICE	16/04/2018	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0001634	Test call list	refreshing afte	r saving a ne
8 SERVICE	28/11/2017	WOCT	CTRT	DES	Design consultation			1.000	500.000	No	WO0001615	Created for	production bat	ch - test
9 SERVICE	20/11/2017	WOCT	CTRT	INST	Installation Fee			1.000	1,250.000	Yes	WO0000114	WS - Weekl	y Service	
0 SERVICE	17/11/2017	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0001608	test creatin	g a call without	a work orde
1 SERVICE	07/11/2017	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0001136	Created for	production bat	ch -
2 SERVICE	04/07/2017	WOCT	CTRT	CALL	Call Out Fee			1.000	150.000	No	WO0001519	PRJ - Loan I	Jnits Processing	
3 SERVICE	04/07/2017	WOCT	CTRT	DES	Design consultation			1.000	500.000	No	WO0001460	SP1912_ND	S_2 - Network (onfiguratio
4 SERVICE	15/06/2017	WOCT	CTRT	INST	Installation Fee			1.000	500.000	No	WO0001477	Test CrNote	Totals for Prici	ng by Type(
15 SERVICE	26/05/2017	WOCT	CTRT	DEA	Dealer Service Fee			1.000	450.000	Yes	WO0001406	v2.1.0.6 Pro	ject Invoices	
6 SERVICE	25/05/2017	WOCT	CTRT	INSP	Inspection			1.000	800.000	Yes	WO0001404	Invoice test	v2.1.0.6 - Fault	y - machine
7 SERVICE	24/05/2017	WOCT	CTRT	DEL	Delivery Fee			1.000	800.000	Yes	WO0001382	Procuremen	nt- Third Party S	ervice
8 SERVICE	24/05/2017	WOCT	CTRT	DEL	Delivery Fee			1.000	800.000	Yes	WO0001379	Contract - 0	all Closure - PR	Release
9 SERVICE	24/05/2017	WOCT	CTRT	DEL	Delivery Fee			1.000	800.000	Yes	WO0001377	Third Party	Service v2.1.0.5	
Shee	1 111/2016	WOOT	CTOT	0.54	Deeles Condee Con			1.000	450.000	AL.	DW0000000	*********		
									•					►
eady 🗘 Accessibili	ity: Good to go											1 🗉 -		



BPO.MNU.077

Help v2.5.0.14 - Pg 5 - Printed: 25/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential