

SERVICE

INTRODUCTION TO WORK IN PROGRESS (WIP)

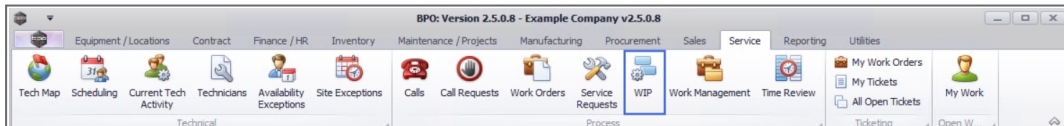
The Work in Progress (WIP) screen displays:

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

The screen displays;

- **stock** or
- **internal assets** that have been issued, as well as
- **Third Party Services** that have been received.

If the items/services are *billable*, then it is an indication that they have not yet been invoiced.

If 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**.

The screenshot shows the 'Work in Progress for all work orders - BPO: Version 2.5.0.8 - Example Company v2.5.0.8' window. The table below is a representation of the data shown in the grid.

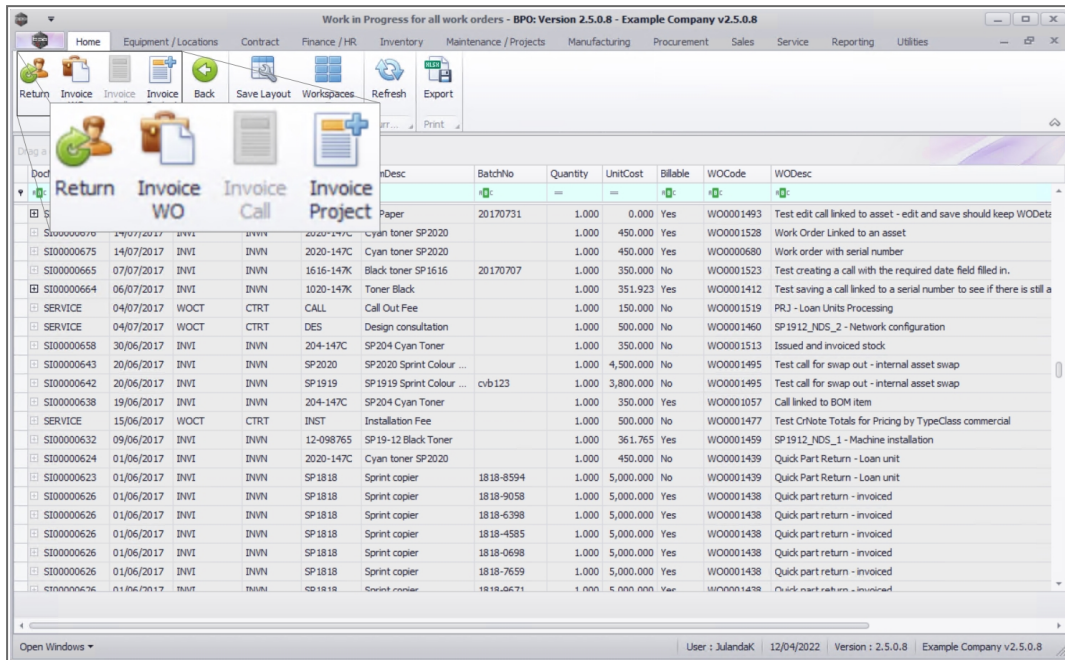
DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000684	01/08/2017	INVI	INVN	A4P	A4 Paper	20170731	1.000	0.000	Yes	WO0001493	Test edit call linked to asset - edit and save should keep WODets
SI00000676	14/07/2017	INVN	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	Yes	WO0001528	Work Order Linked to an asset
SI00000675	14/07/2017	INVN	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	Yes	WO0000680	Work order with serial number
SI00000665	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.
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 still a
SERVICE	04/07/2017	CTRT	CALL		Call Out Fee		1.000	150.000	No	WO0001519	PRJ - Loan Units Processing
SERVICE	04/07/2017	CTRT	DES		Design consultation		1.000	500.000	No	WO0001460	SP1912_NDS_2 - Network configuration
SI00000658	30/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	No	WO0001513	Issued and invoiced stock
SI00000643	20/06/2017	INVI	INVN	SP2020	SP2020 Sprint Colour ...		1.000	4,500.000	No	WO0001495	Test call for swap out - internal asset swap
SI00000642	20/06/2017	INVI	INVN	SP1919	SP1919 Sprint Colour ...	cvb123	1.000	3,800.000	No	WO0001495	Test call for swap out - internal asset swap
SI00000638	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
SI00000632	09/06/2017	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0001459	SP1912_NDS_1 - Machine installation
SI00000624	01/06/2017	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	No	WO0001439	Quick Part Return - Loan unit
SI00000623	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-8594	1.000	5,000.000	No	WO0001439	Quick Part Return - Loan unit
SI00000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-9058	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI00000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-6398	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI00000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-4585	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI00000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-0698	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI00000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-7659	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced
SI00000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-0671	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced

PROCESSING ACTION BUTTONS

From this screen, you can:

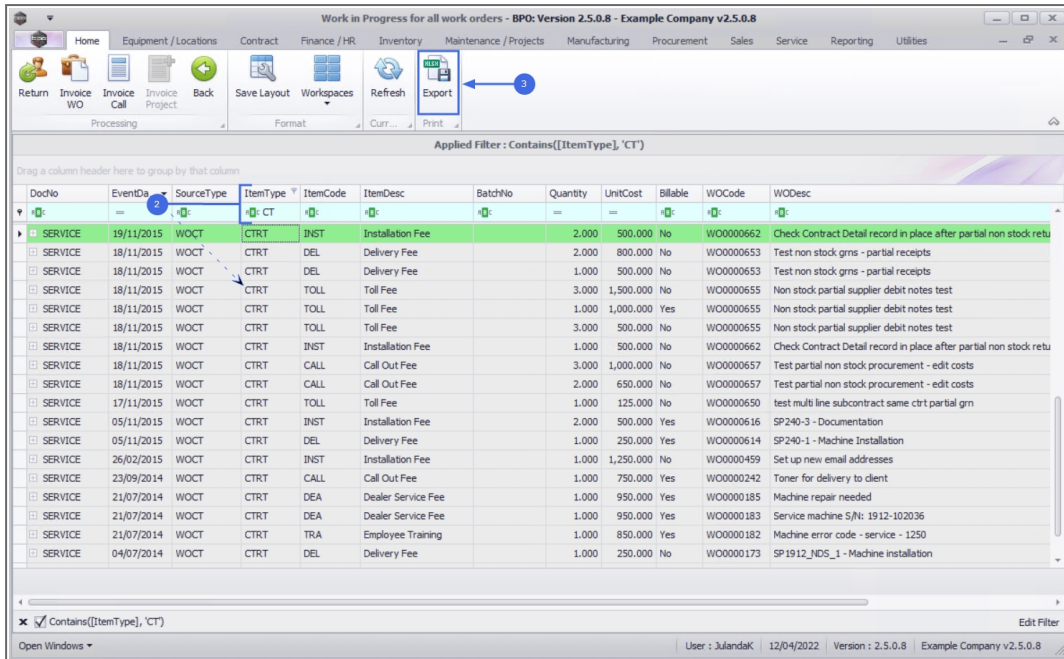
- Return an item or service using the **Return** button.
- Invoice a work order using the **Invoice WO** button.

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

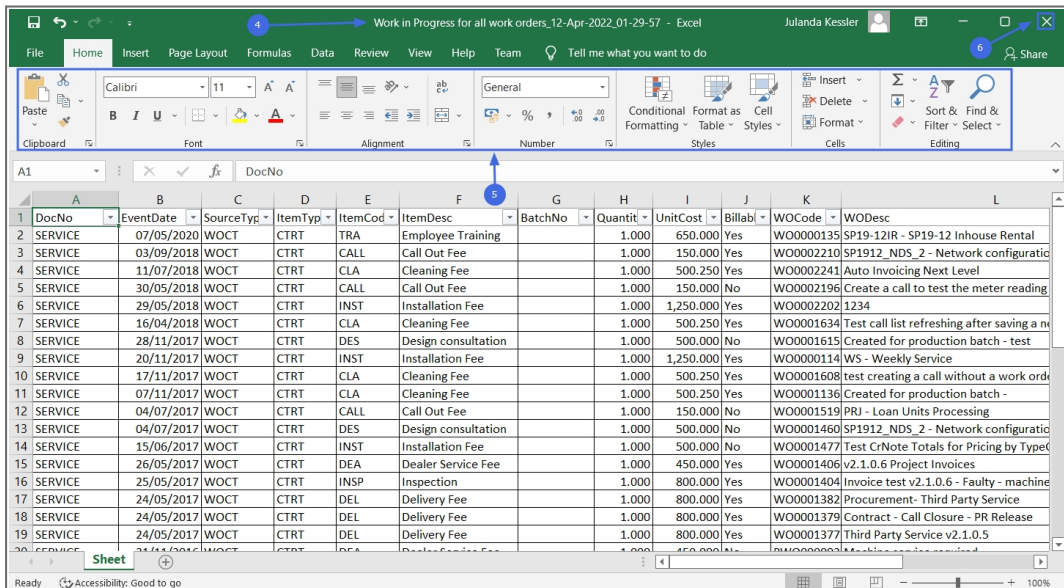


EXPORT

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***.



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.





BPO.MNU.077

