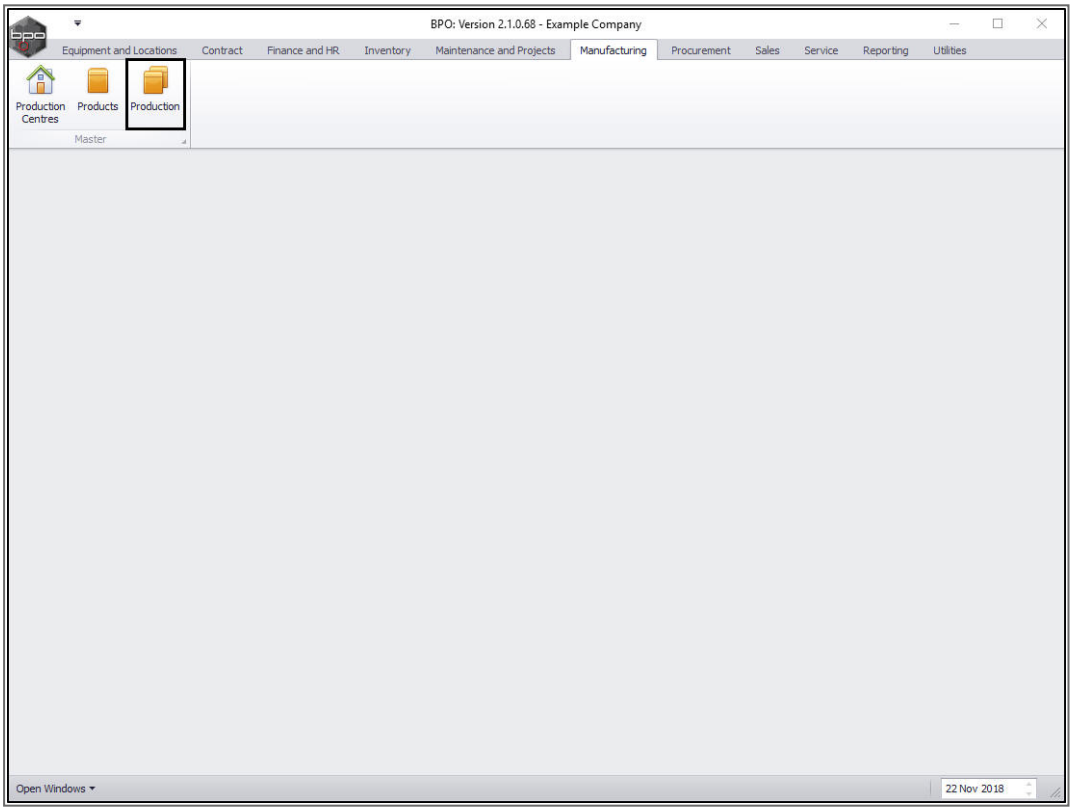
MANUFACTURING

PRODUCTION - ADD EXPENSES

There may be additional **expenses** incurred during production. These will need to be added to the **work order** that is linked to the production run.

Ribbon Access: *Manufacturing > Production*



The ***Production*** listing screen will be displayed.

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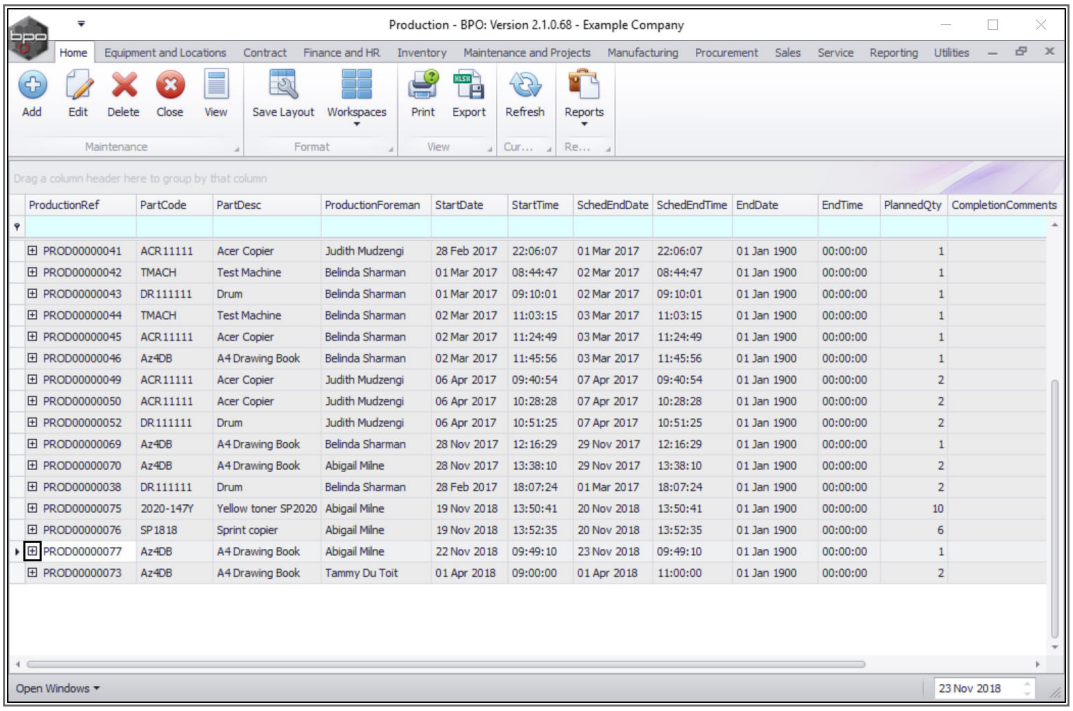
ADD EXPENSES VIA THE PRODUCTION LISTING SCREEN

SELECT PRODUCTION RUN

- Click on the ***expand*** button in the row of the ***production run***where you wish to log expenses.



The ***Production Work Orders*** frame will be expanded.

SELECT WORK ORDER

- ***Double click*** anywhere in the ***row*** of the work order.

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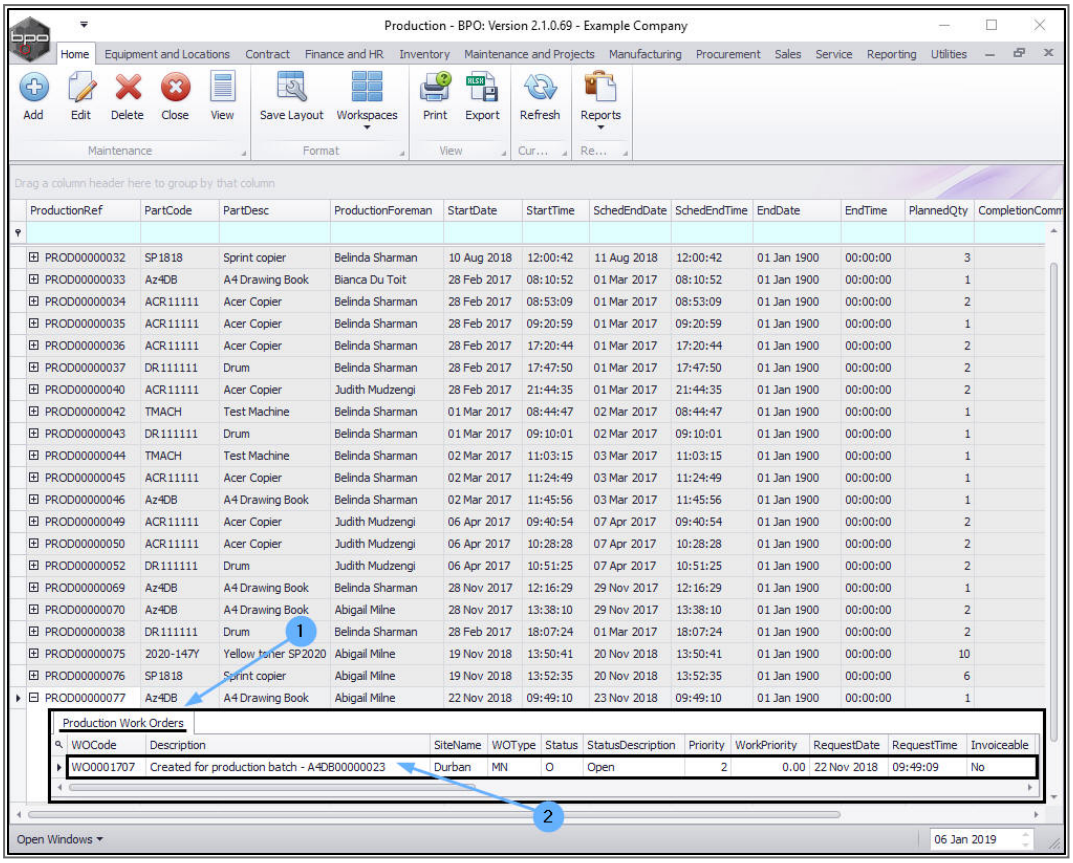

The ***Maintain WO - Ref [ ]*** screen will be displayed.

SELECT THE EXPENSES TILE

- Click on the ***Expenses*** tile.

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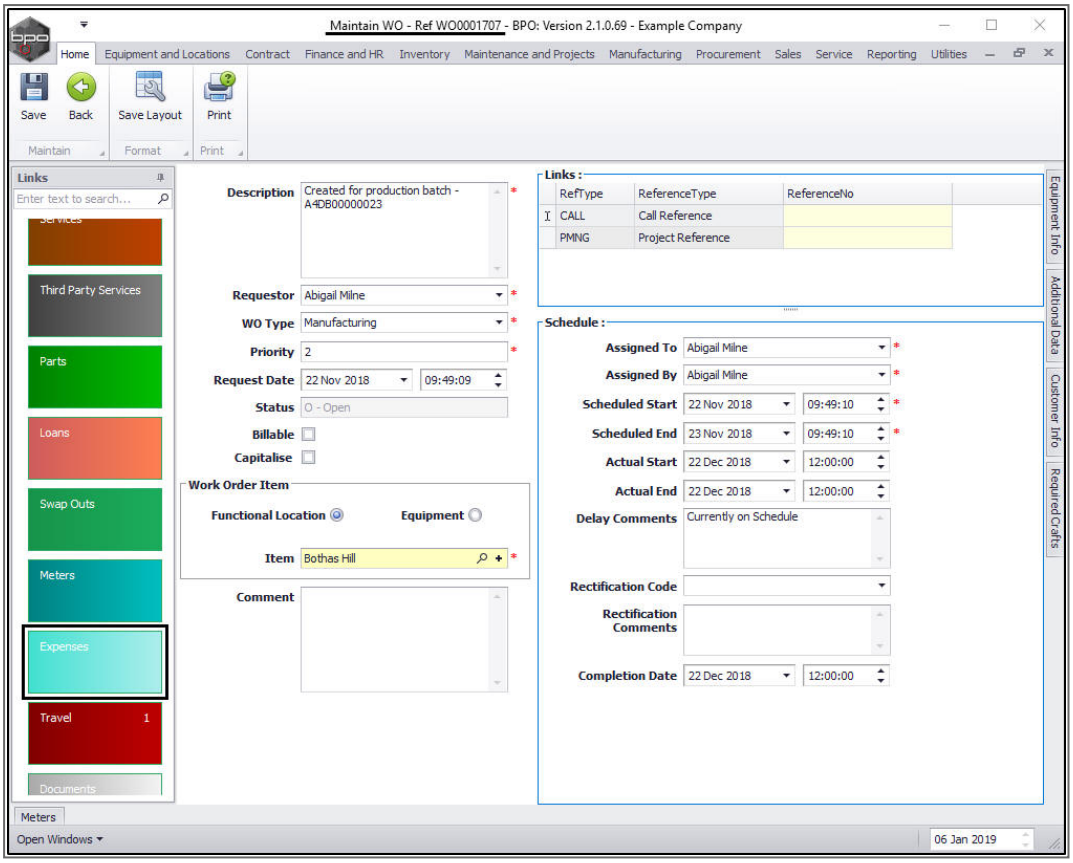

The ***Expense Claims for WO Code [ ]*** screen will be displayed.

ADD EXPENSE CLAIM

2. Click on ***Add***.

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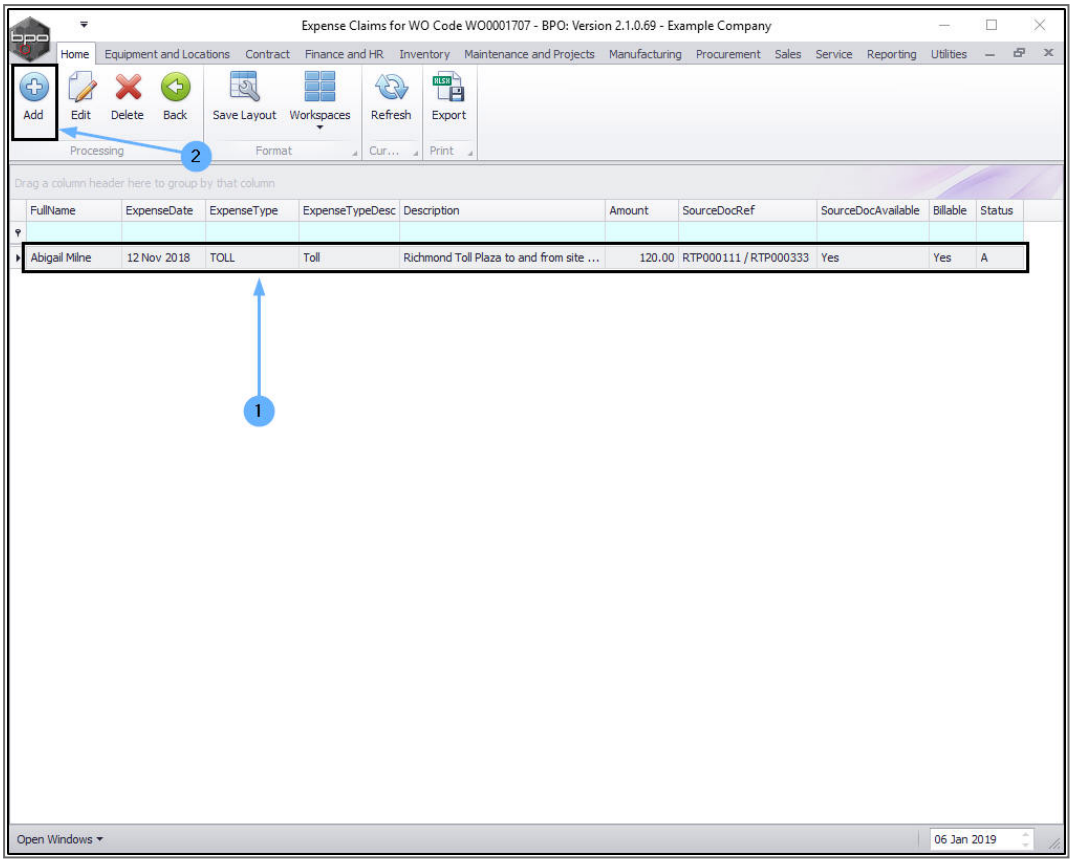

The ***Expense Entry*** screen will be displayed.

ADD EXPENSE DETAILS

- **Work Order:** This will auto populate according to the work order initially selected.
- **Employee:** This will auto populate with the name of the person currently logged on to the system but you can click on the drop-down arrow and select an alternative employee from the menu if required.
- **Expense Date:** This will default to the current date. Either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.

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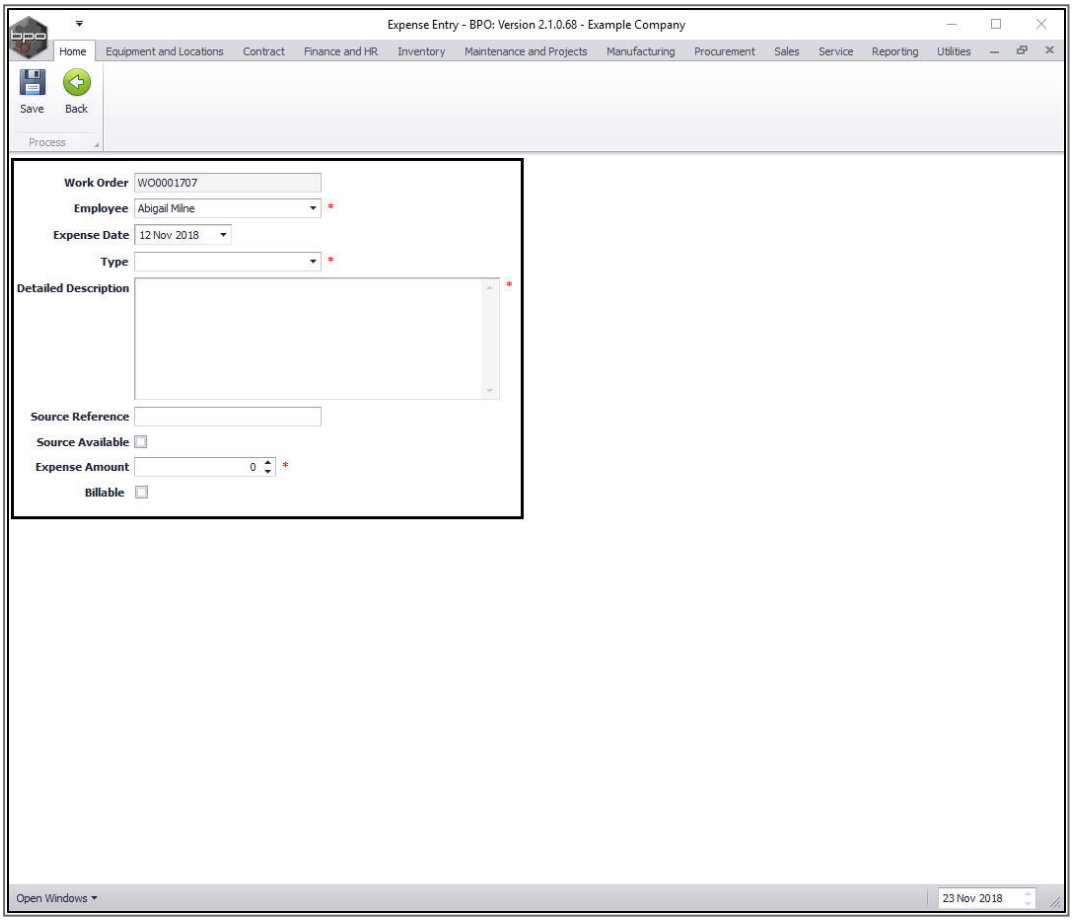
- **Type:** Click on the drop-down arrow and select from the menu the type of expense.
- **Detailed Description:** Type in a description for the expenses.
- **Source Reference:** Type in the reference number of the receipt.
- **Source Available:** Select this checkbox if the receipt is available.
- **Expense Amount:** Type in or use the arrow indicators to select the total amount of the expense.
- **Billable:** Select this check box if the service is billable.



SAVE EXPENSE CLAIM

- When you have finished adding details to this screen, click on *Save*.

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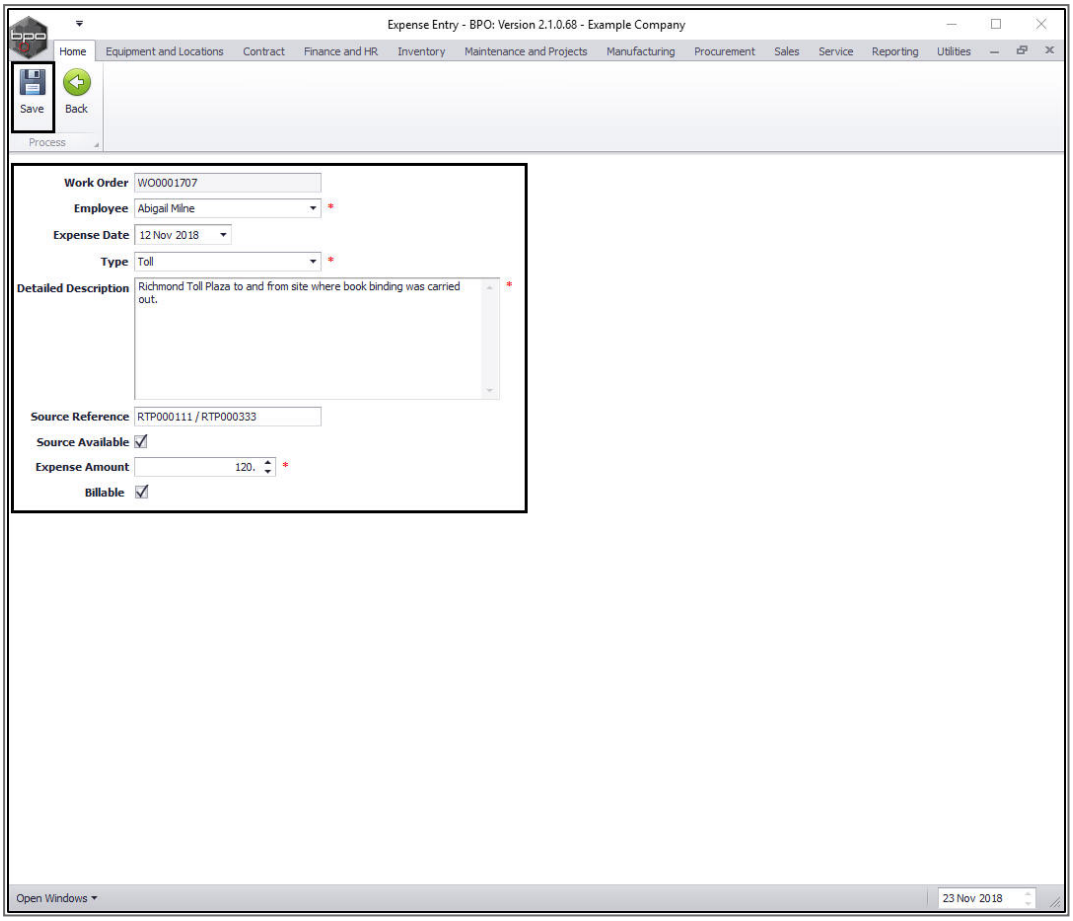

You will return to the ***Expense Claims for WO Code [ ]*** screen.

- An ***Expense Processing*** message box will pop up informing you that;
    - ***Expense Claim on WO: [ ] complete.***
- Click on ***OK***.

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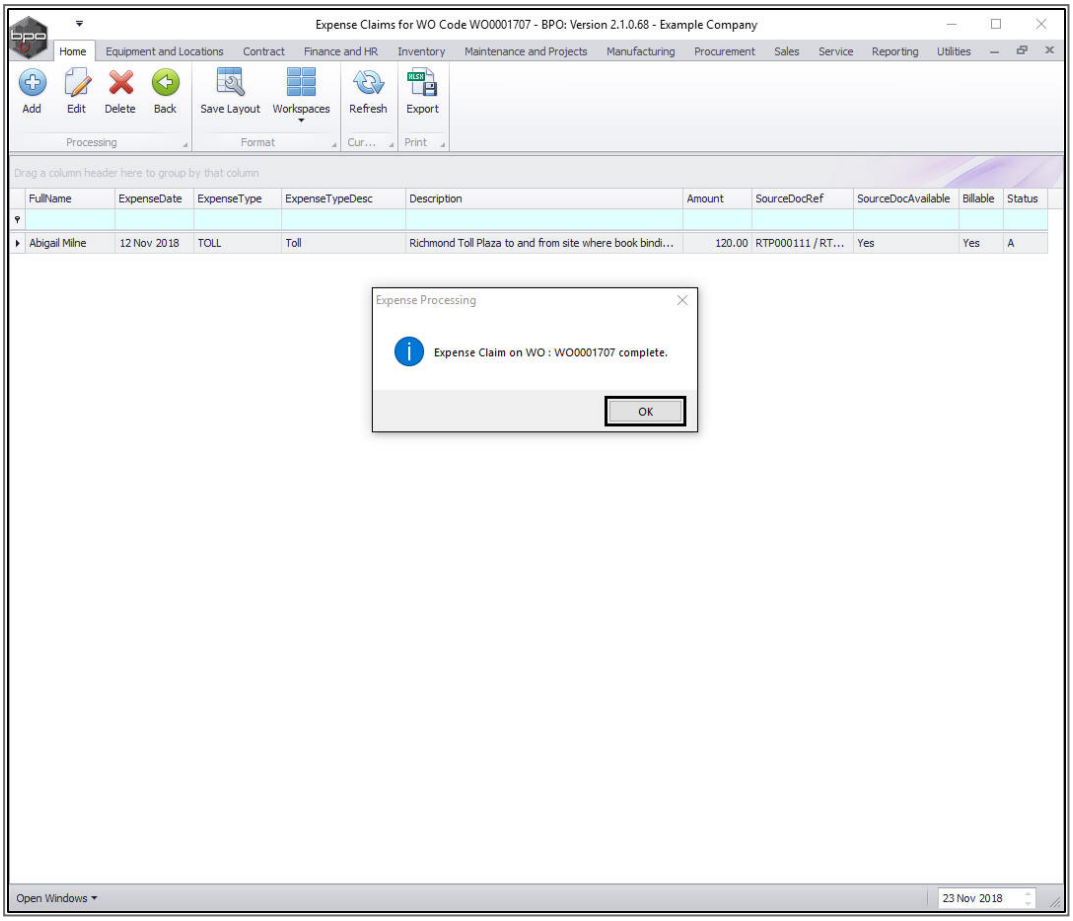

VIEW ADDED EXPENSE CLAIM

1. You can now view the added expense claim.

RETURN TO THE PRODUCTION SCREEN

2. Click on ***Back*** or ***Close*** the screen when you are done. (You can keep closing screens until you return to the **Production Listing** screen).
3. Alternatively, click on the drop-down ***arrow*** next to ***Open Windows***.

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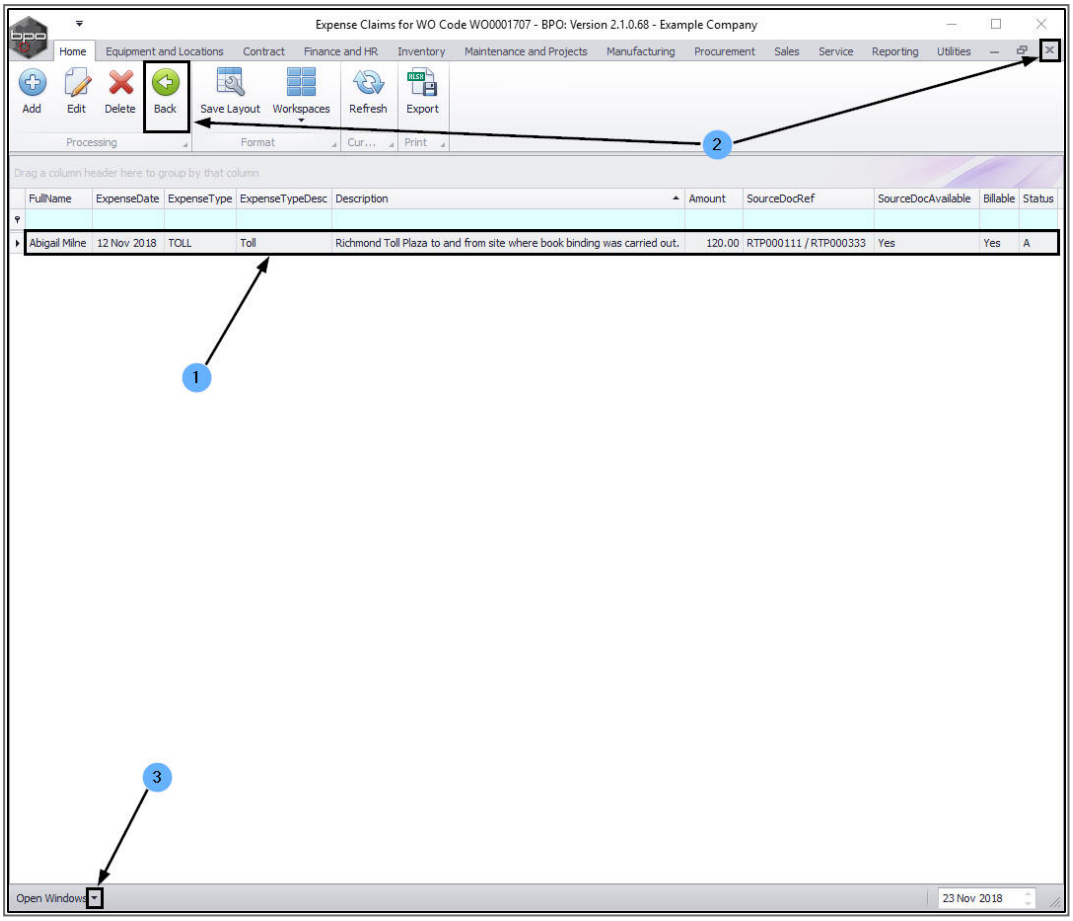

- A list of ***open windows*** will be displayed.
- Select the window that you wish to ***return*** to.
    - In this example we have selected to return to the ***Production*** screen.

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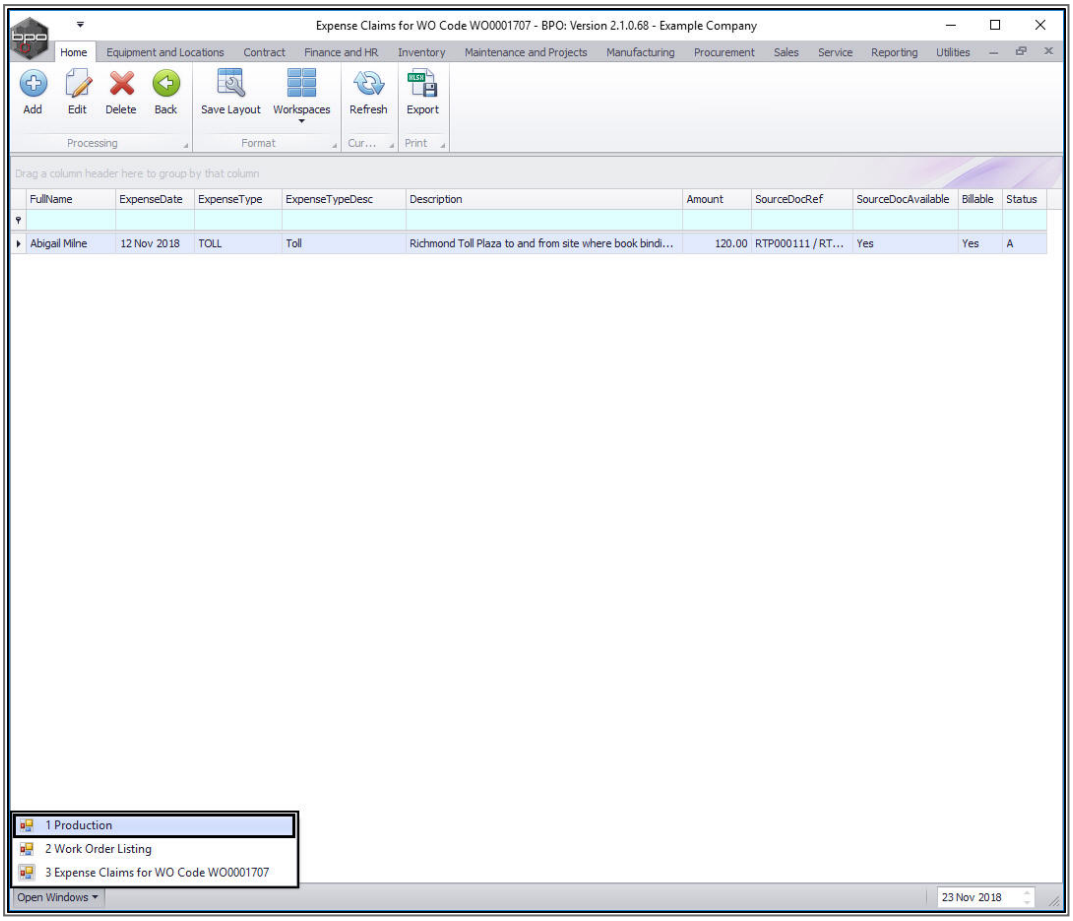

- You will return to the ***Production*** screen where this process was begun.

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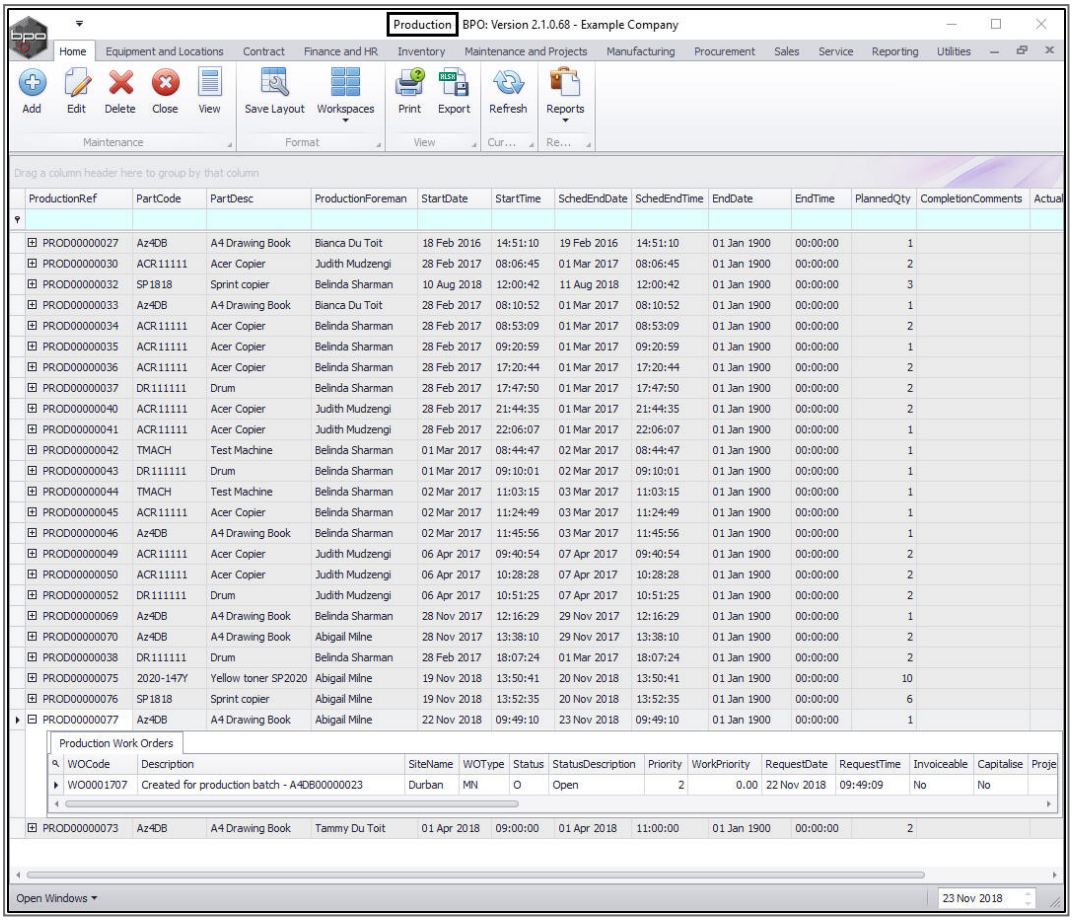

ADD EXPENSES VIA THE WORK ORDERS LISTING SCREEN

SELECT PRODUCTION RUN

- Click on the ***expand*** button in the row of the ***production run*** where you wish to log expenses.

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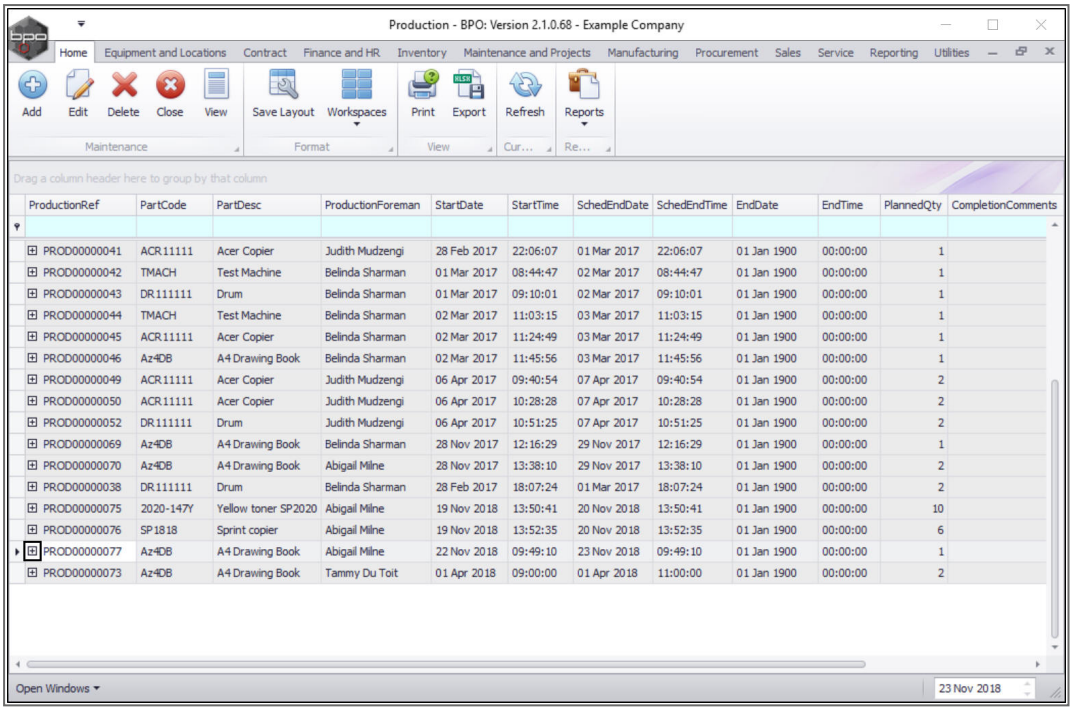

The ***Production Work Orders*** frame will be expanded.

NOTE THE WORK ORDER NO.

1. Make a note of the ***Work Order No.*** linked to the production run.

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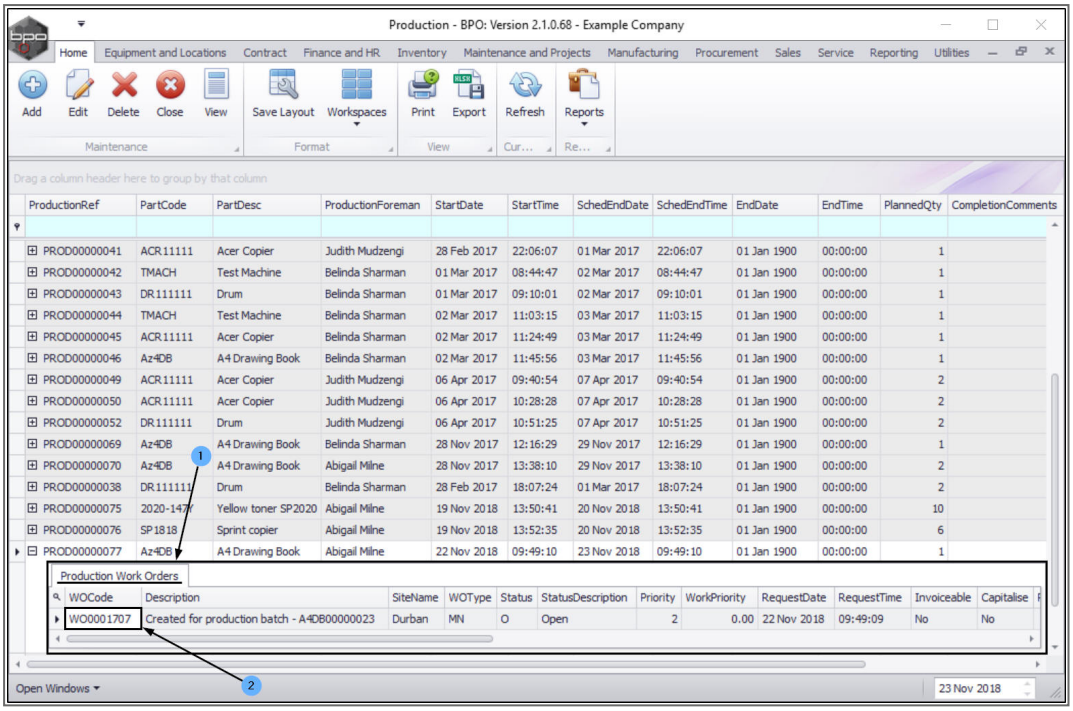

NAVIGATE TO THE WORK ORDER LISTING SCREEN

- Now navigate via the Service tab, to the ***Work Order*** listing screen.

Ribbon Access: *Service > Work Orders*

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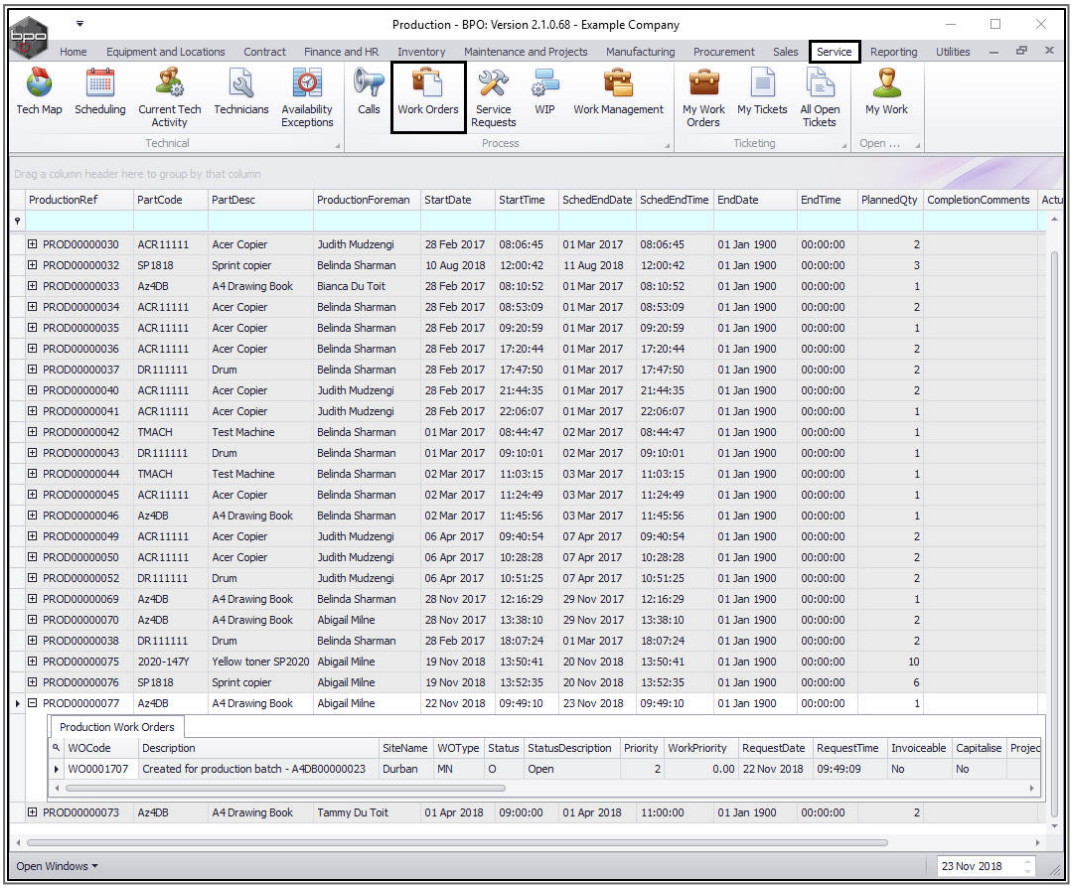

In the ***Work Order Listing*** screen,

SELECT THE SITE AND STATUS

1. Ensure that the correct ***site*** and ***status*** are selected.

SELECT THE WORK ORDER

2. Use the Find WO button or the Filter Row to search for the work order.

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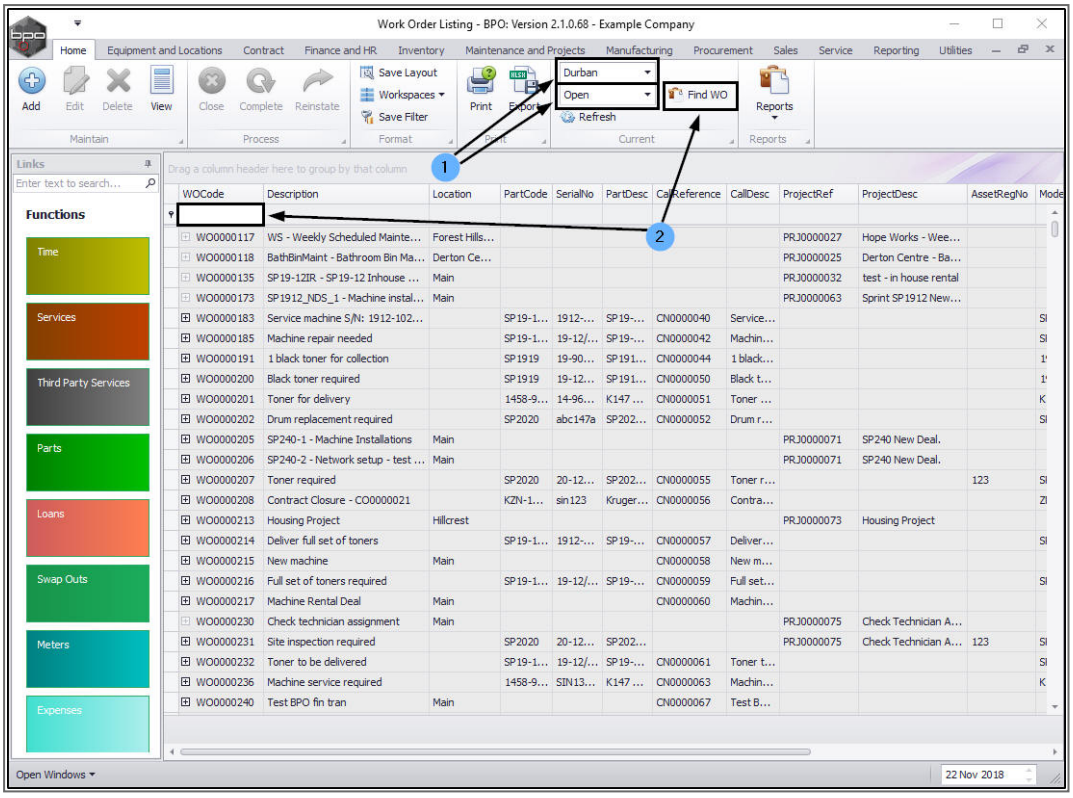

SELECT THE EXPENSES TILE

- Once the work order has been found and ***selected***, click on the ***Expenses*** tile.

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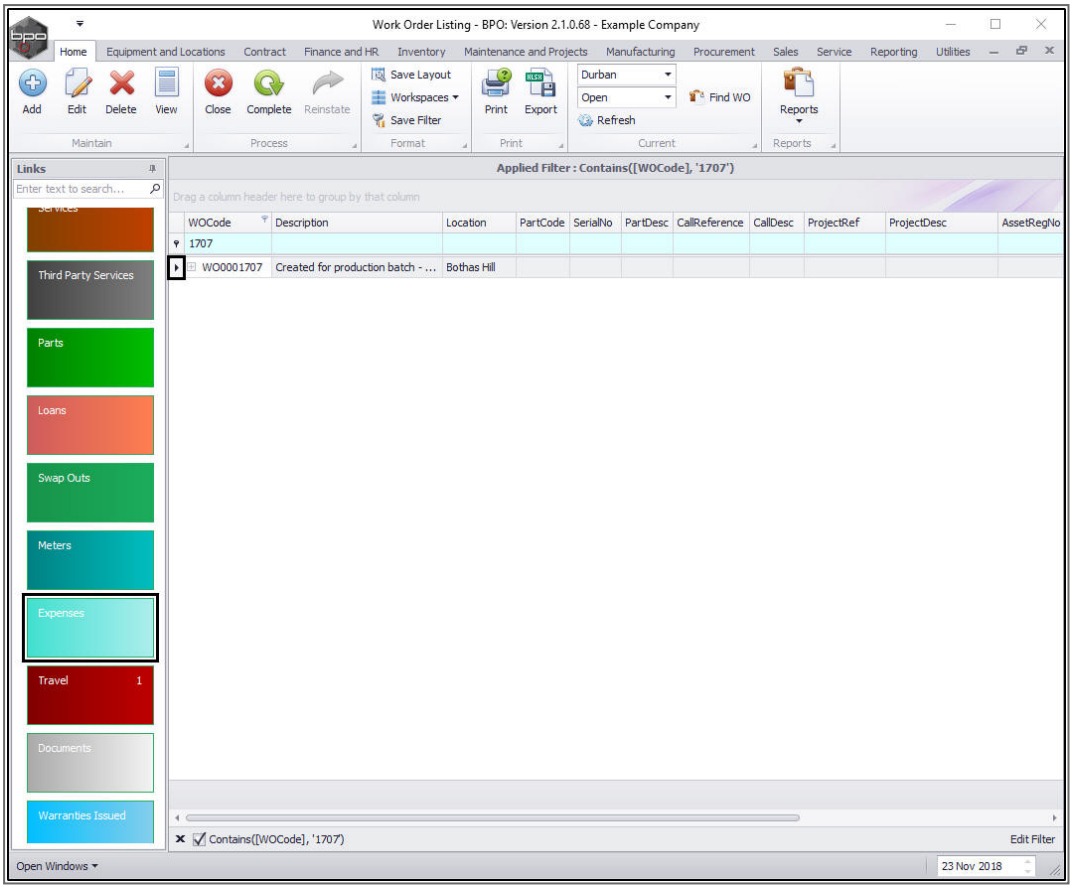

The ***Expense Claims for WO Code [ ]*** screen will be displayed.

ADD EXPENSE CLAIM

- Click on ***Add***.

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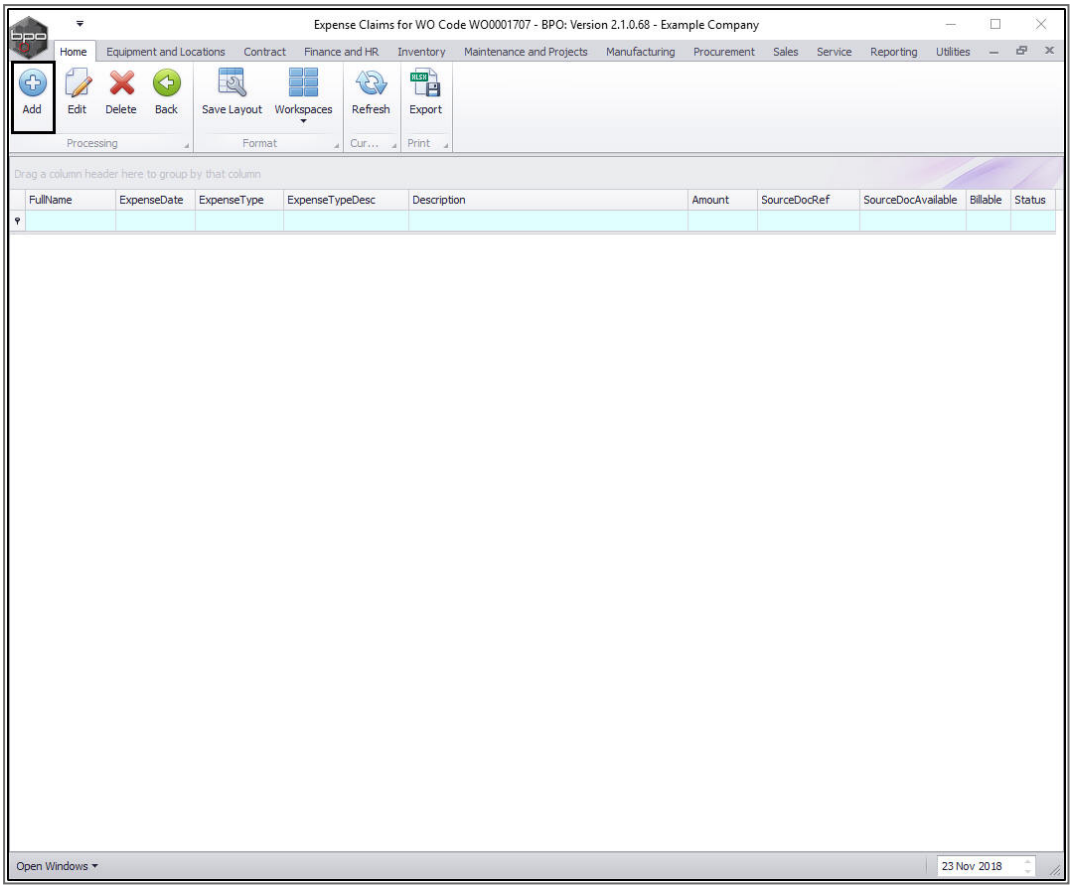

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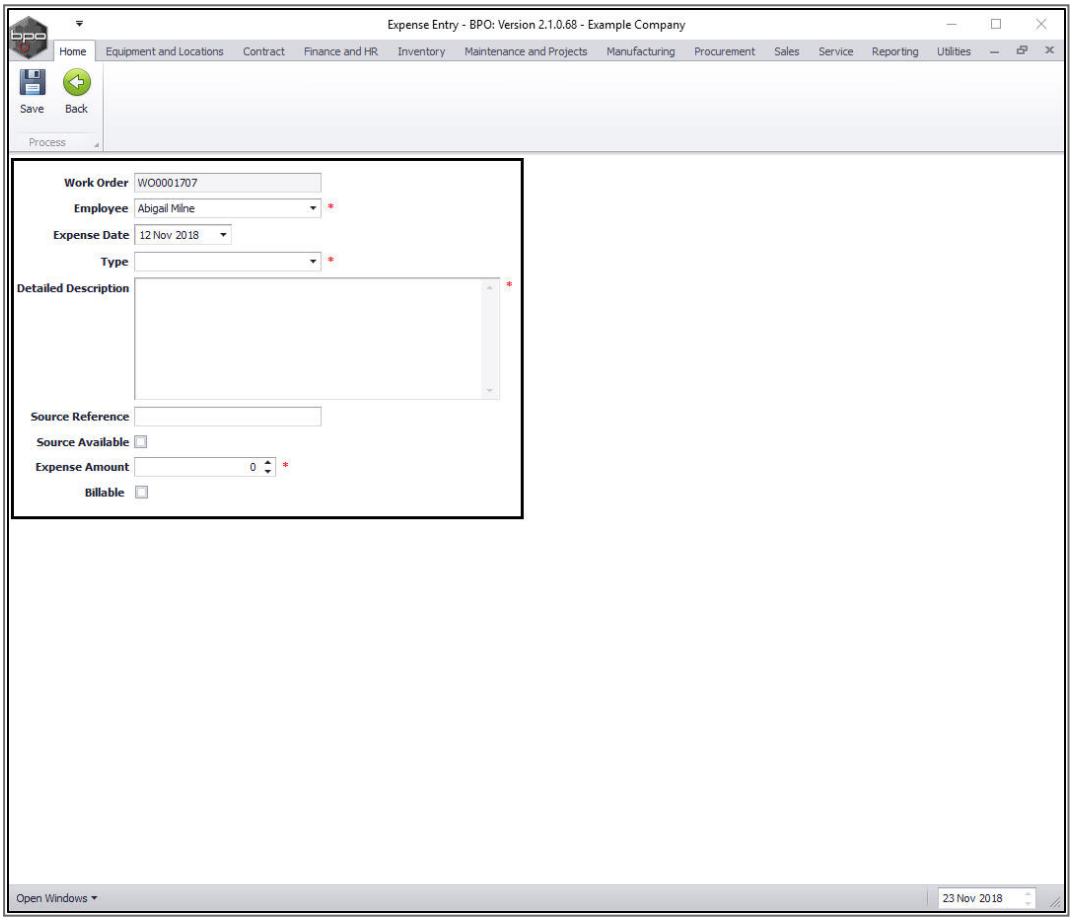

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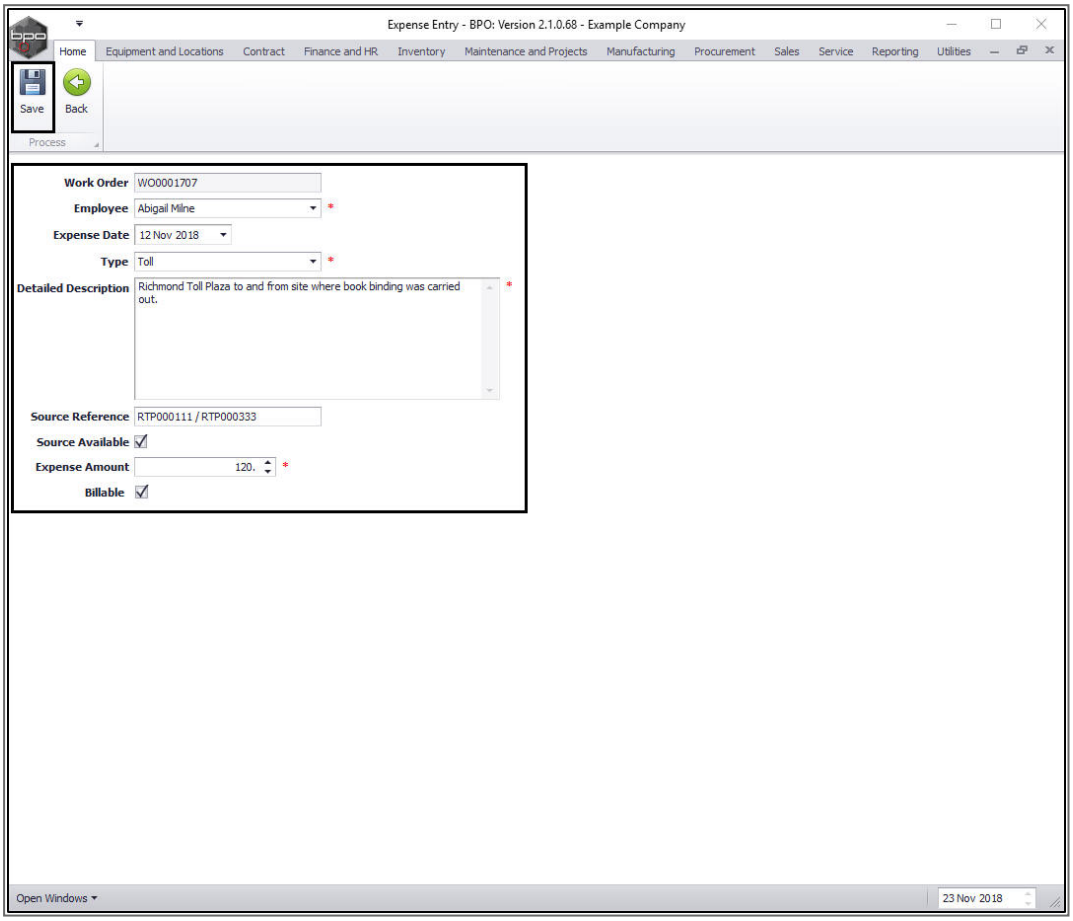

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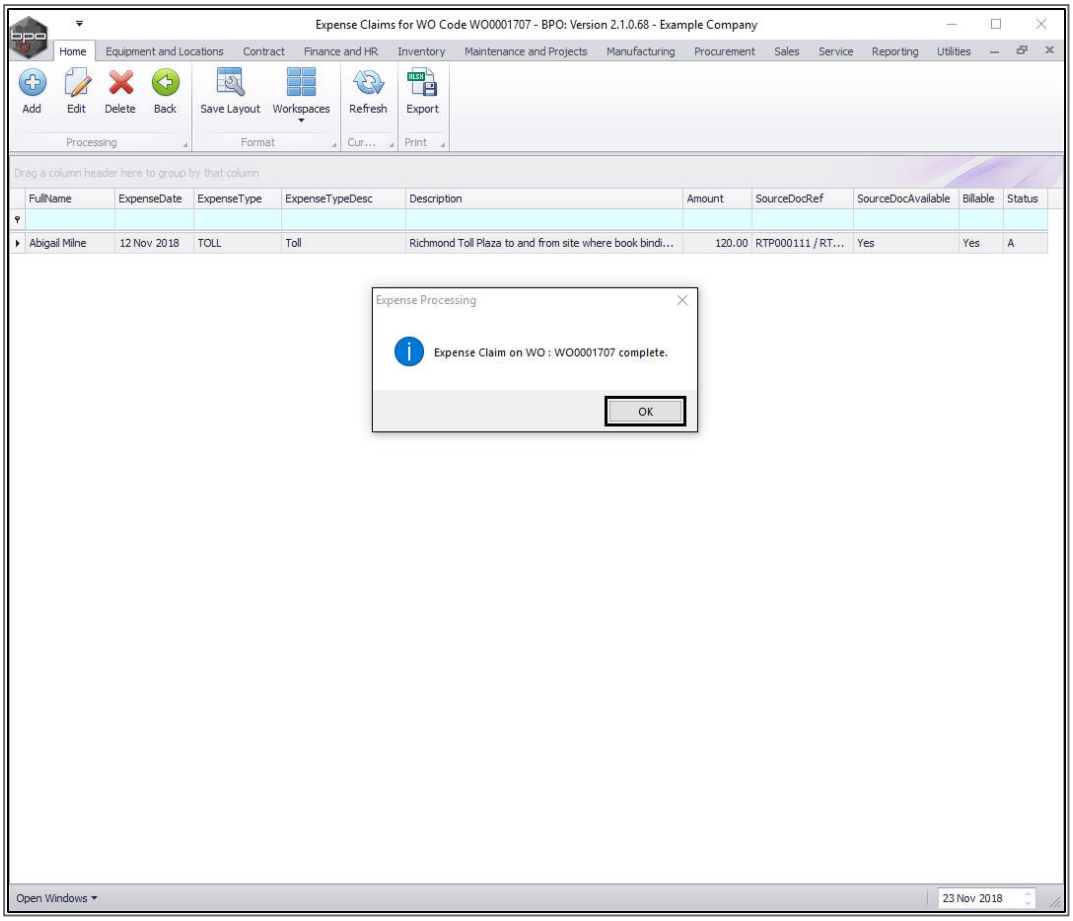

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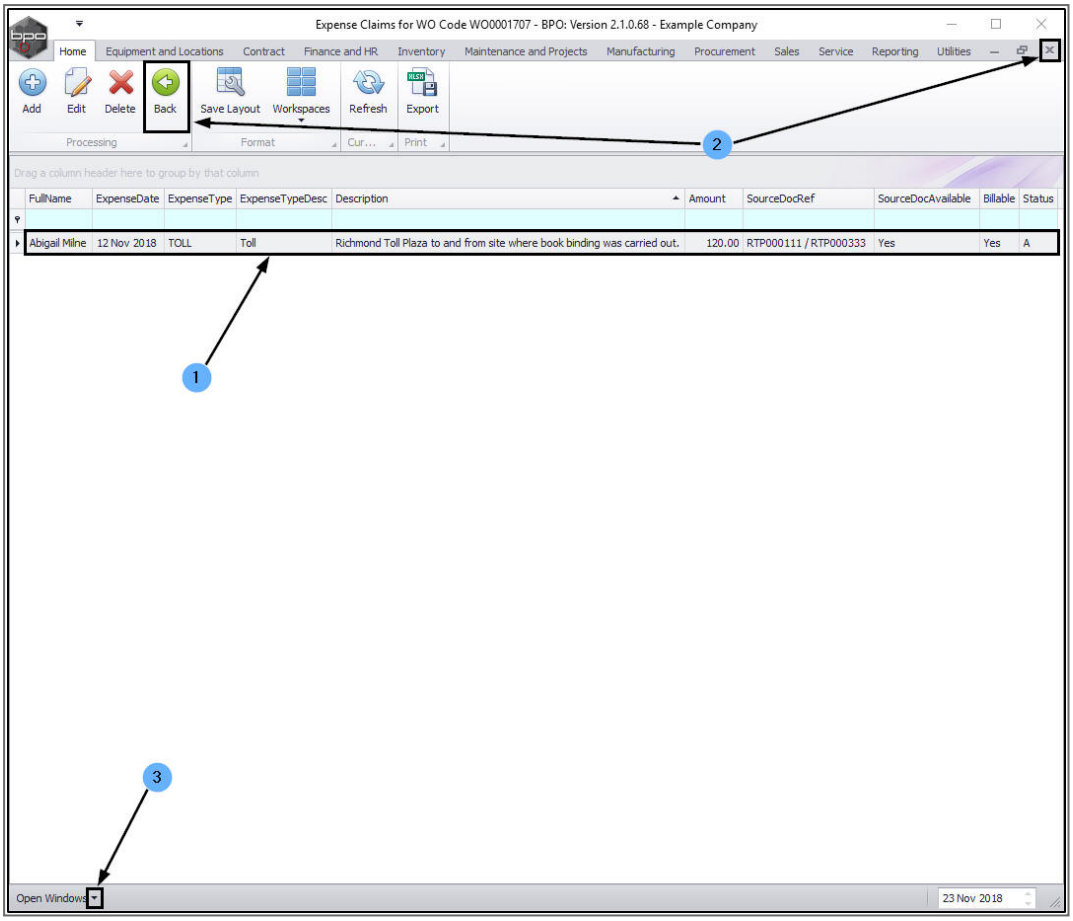

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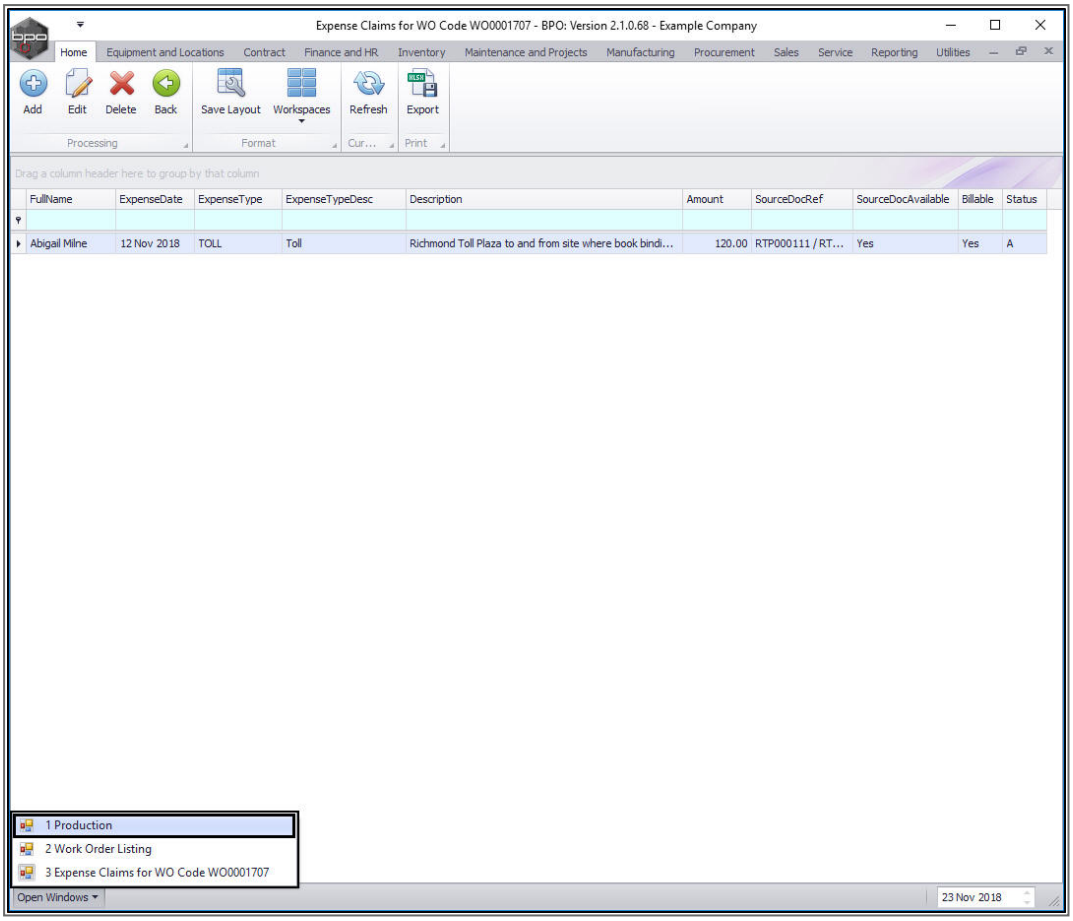

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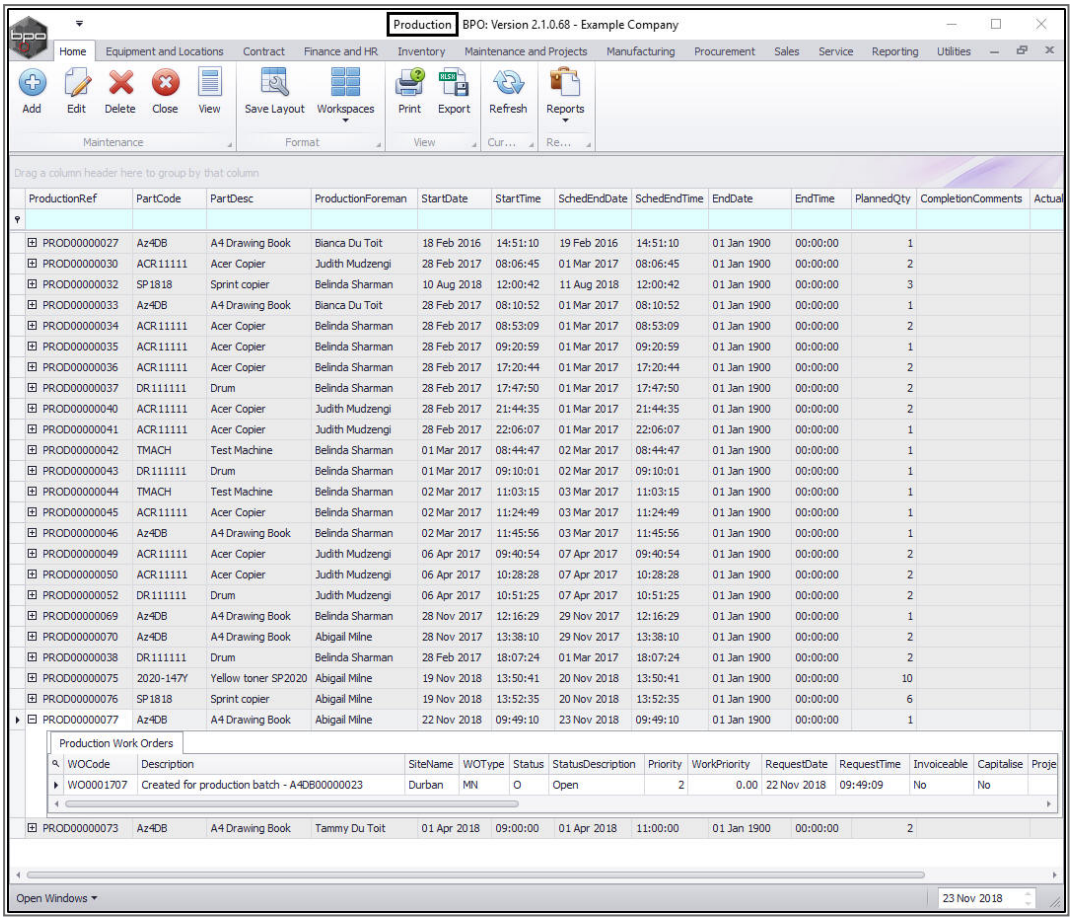

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