

PROJECTS

PROJECTS – WORK IN PROGRESS

The Work in Progress (WIP) screen displays:

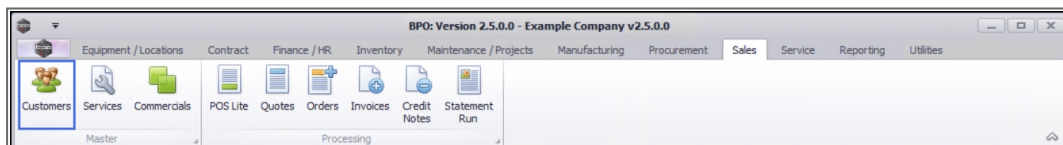
- **Parts** that have been issued or
- **Third Party Services** that have been received

but have not yet been invoiced.

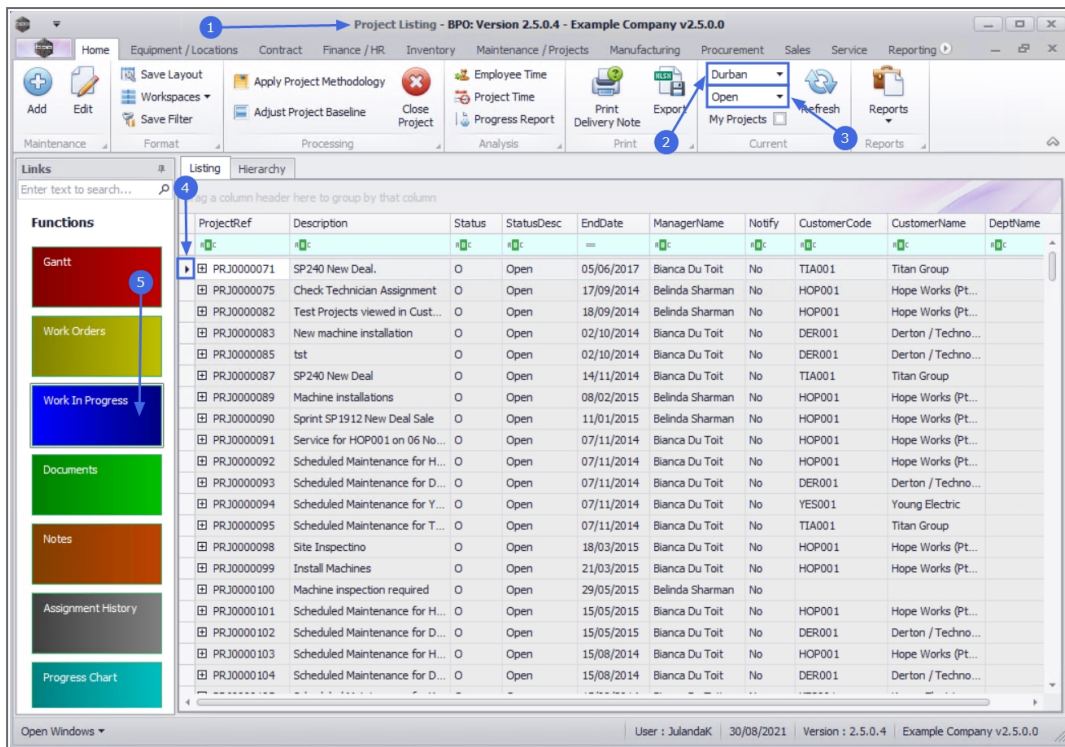
If these items are **non** billable, the work order, call or project will **not** have been closed yet.

Return Requests can be raised for **Internal Assets** to return the item to the **Asset warehouse**.

Ribbon Access: *Maintenance / Projects > Projects*



1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Click on the **row** of the project you wish to view the Work in Progress for.
5. Click on the **Work In Progress** tile.



6. The **Work in Progress for Project, Ref No : [project ref number]** listing screen will be displayed.

- The screen displays both **stock** or **internal assets** that have been issued, as well as **Third Party Services** that have been received
- If the items / services are billable - they have not been invoiced.
- If the items are non-billable, the linked work order, call or project has not yet been closed.

7. The **Doc No** column displays the, Work in Progress reference number for a **part** with a **SI** prefix to the number.

- A **service** Work in Progress will display as **SERVICE**.

WIP PROCESSING

8. From this screen, you can:

- ✓ Do a Return Request for an item or service,
- ✓ Invoice a work order, or
- ✓ Invoice a project.



The *Invoice Call* button has been greyed out indicating that a Call cannot be Invoiced from this screen.

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000800	29/05/2018	INVI	INVN	9855632	Air Freshner		1.000	22.641	No	WO0000286	WS - Weekly Service
SI00000801	29/05/2018	INVI	INVN	CL-100-965	Cleaner		1.000	13.329	No	WO0000286	WS - Weekly Service
SI00000815	02/07/2018	INVI	INWN	CL-100-965	Cleaner	789	1.000	13.329	No	WO0000206	SP240-2 - Network setup - test edi wor

RETURN REQUEST

1. From the *Work in Progress for Project, Ref No : [project ref number]* listing screen,
2. Click on the **row** of the Service or Part that you wish to return.
3. Click on the **Return** button.



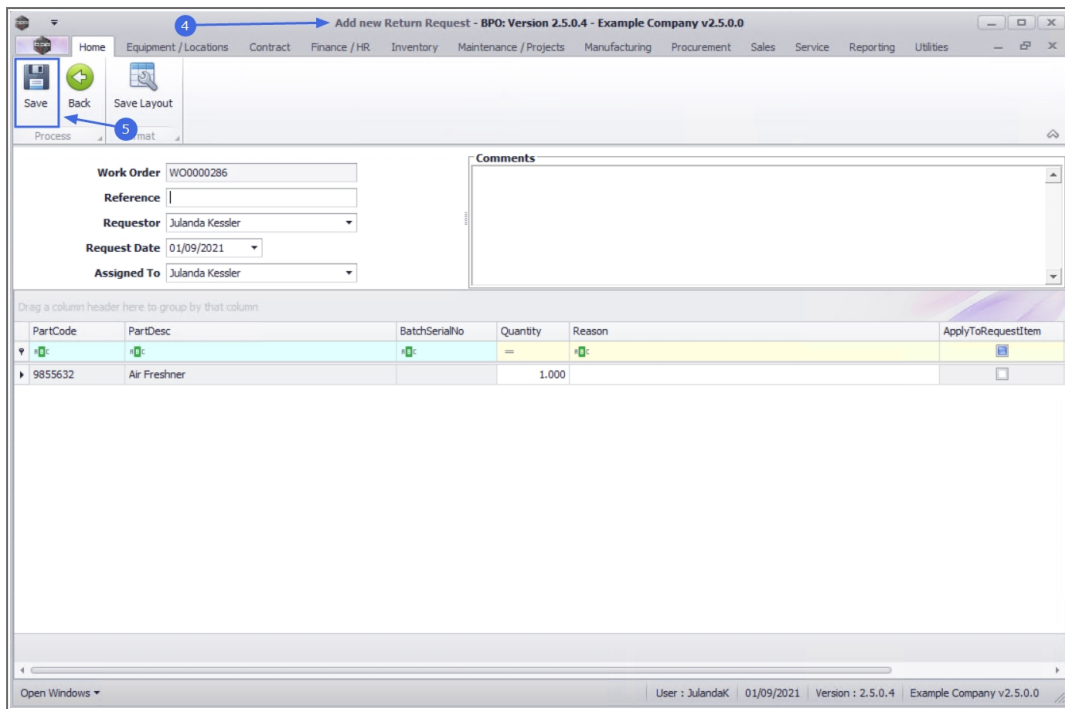
Short cut key: **Right click** to display the **Process** menu list. Click on **Return**.

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCODE	WODesc
SI00000800	29/05/2018	INVI	INWN	9855632	Air Freshner		1.000	22.641	No	WO0000286	WS - Weekly Service
SI00000801	29/05/2018	INVI	INWN	CL-100-965	Cleaner		1.000	13.329	No	WO0000286	WS - Weekly Service
SI00000815	02/07/2018	INVI	INWN	CL-100-965	Cleaner	789	1.000	13.329	No	WO0000206	SP240-2 - Network setup - test edi wor

4. "The Add new Return Request screen will be displayed." on page 2
5. After completing all the required information, click on **Save**.



For a detailed handling of this topic refer to [Work in Progress - Returns](#)

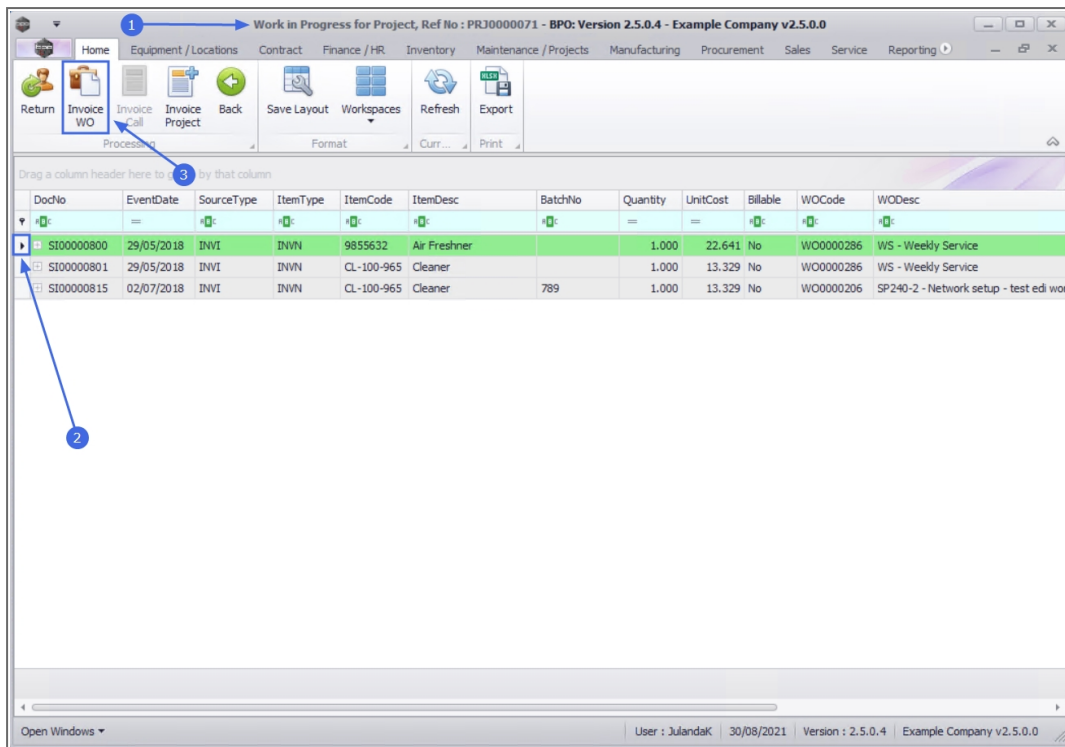


INVOICE WORK ORDER

1. From the **Work in Progress for Project, Ref No : [project ref number]** listing screen,
2. Click on the **row** of the Service or Part that you wish to Invoice.
3. Click on **Invoice WO**.



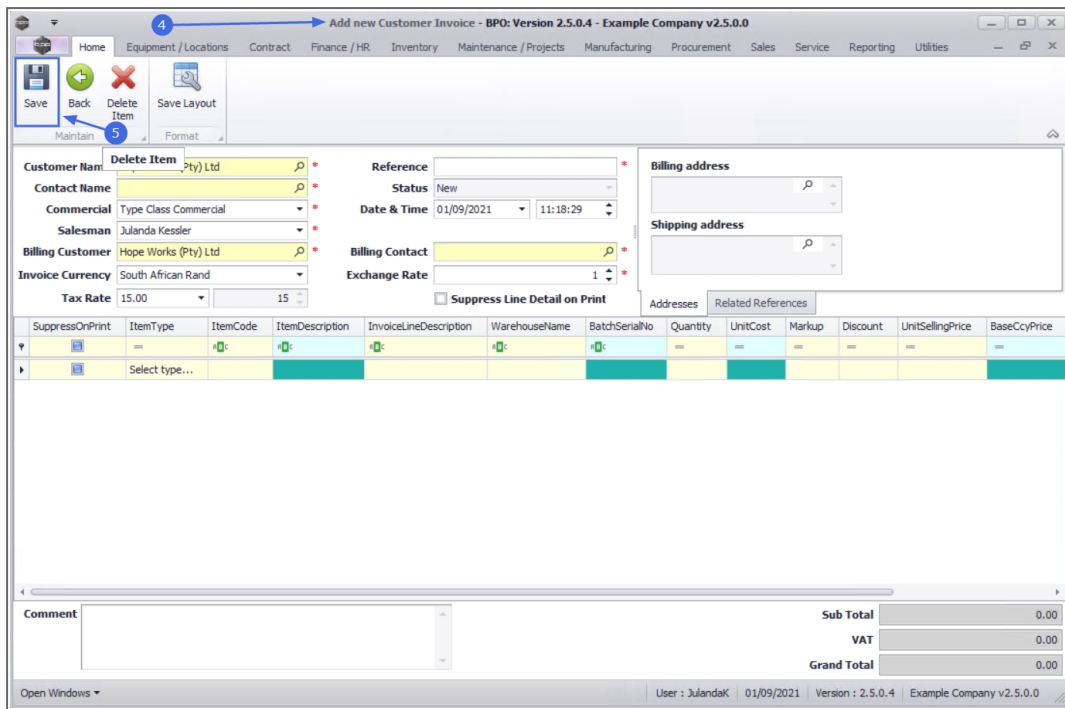
Short cut key: **Right click** to display the **Process** menu list. Click on **Invoice WO**.



4. " The Add new Customer Invoice screen will display. " on page 2
5. After completing all the required information, click on **Save**.



For a detailed handling of this topic refer to [Work in Progress - Invoice Work Orders](#)

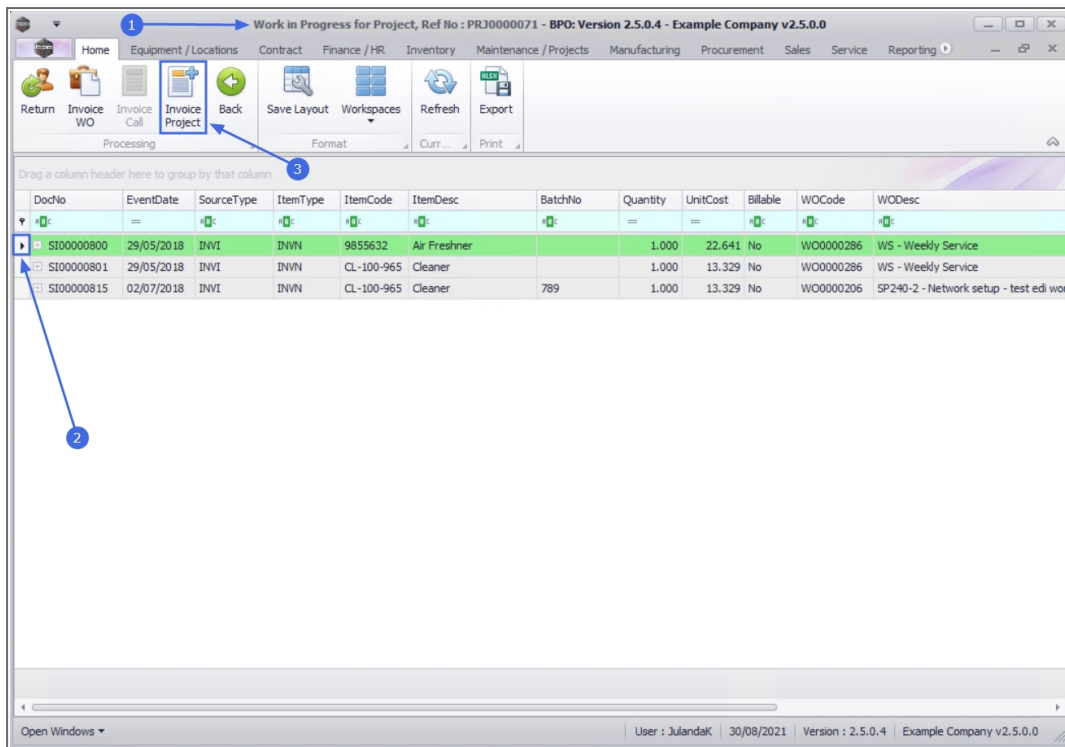


INVOICE PROJECT

1. From the **Work in Progress for Project, Ref No : [project ref number]** listing screen,
2. Click on the **row** of the Service or Part that you wish to invoice.
3. Click on **Invoice Project**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Invoice Project**.



4. " The Add new Customer Invoice screen will display. " on page 2
5. After completing all the required information, click on **Save**.



For a detailed handling of this topic refer to [Work in Progress - Invoice Project](#)

4 → Add new Customer Invoice - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout

Maintain | Format

Customer Name Titan Group *
Contact Name Discount Commercial *
Commercial Discount Commercial *
Salesman Julanda Kessler *
Billing Customer *
Invoice Currency South African Rand *
Tax Rate 15.00 * 15

Reference *
Status New *
Date & Time 01/09/2021 11:25:28 *
Billing Contact *
Exchange Rate 1 *
 Suppress Line Detail on Print

Billing address *
Shipping address *

Addresses | Related References

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	=						=	=	=	=	=	=
		Select type...										

Comment

Sub Total 0.00
VAT 0.00
Grand Total 0.00

Open Windows | User : JulandaK | 01/09/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

MNU.058.021

