

# SERVICE

## **WORK ORDERS - EXPENSES**

Confirm with your supervisor as to whether <u>you</u> will log your expenses, or whether the <u>call centre administration</u> will do this.

Expenses will be updated automatically for clients using Tech Connect.

Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site* where the work order was assigned.
  - The example has *Durban* selected.
- 3. Set the *Status* to *Open*.
- Click on the *row* of the *work order* you wish to *add* an expense claim to.
- 5. Click on the *Expenses* tile.



#### Work Orders - Expenses

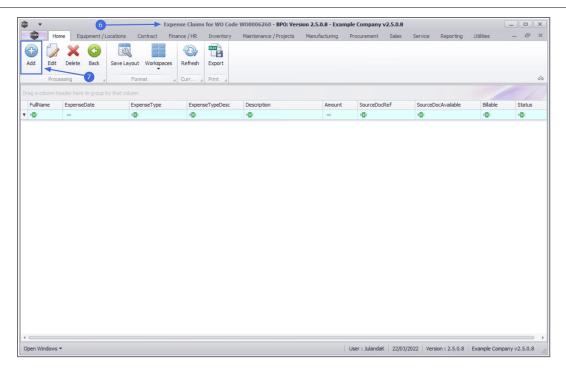
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Travel				IMP	CN0005302	New machine implementation. Installation	No	New machine implemen	24/01/2022	1	No		
			E WO0006257	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	19/01/2022	2	No		
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Documen	ate-		WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2	Yes		
		10	• • WO0006260	REP	CN0005304	Loan unit required while main unit is being	No	Loan unit required whil	15/03/2022	3	No		

6. The *Expense Claims for WO Code [work order code]* screen will be displayed.

#### **ADD EXPENSE CLAIM**

7. Click on Add.





- 8. The *Expense Entry* screen will be displayed.
  - Work Order: The work order number selected will auto populate the field.
  - **Employee:** The employee logging the expense entry will display in this field. Click on the *search* button to select the employee who incurred the expense.
  - Expense Date: The current date will display. Click on the down *arrow* to select the date the expense was incurred, using the calendar function.
  - **Type:** Click on the down *arrow* to select the Expense type.

Refer to **Basic Static Data** to add or edit an expense type.

- **Detailed Description:** Type in the description or reason for the expenses.
- **Source Reference:** Type in the reference or proof for the expense, e.g. receipt information, if available.



- **Source Available:** Click to select the *check box*, if documentation, e.g receipt, for the expense, if available.
- **Expense Amount:** Click to type in or use the arrow indicators to select the rand value for the expense.
- **Billable:** Click to select the check box if the expense <u>is</u> billable. Leave unselected, if the expense is <u>not</u> billable.
- 9. When you have finished adding the expense claim details, click on *Save*.

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- 10. You will return to the *Expense Claims for WO Code* screen.
- 11. When you receive the *Expense Processing* message to confirm that;
  - Expense Claim on WO: [work order code] complete.
- 12. Click on OK.



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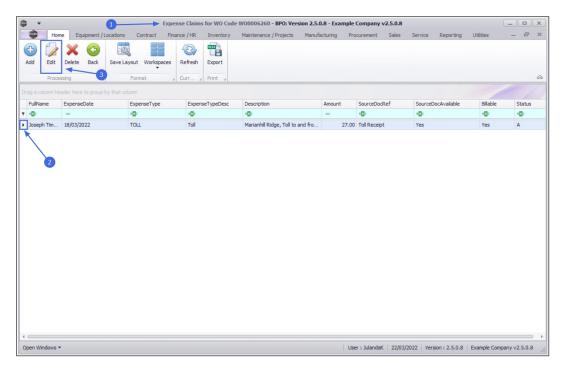
13. The Expense Claim can be viewed in the *Expense Claims for WO Code* screen.

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#### **EDIT EXPENSE CLAIM**

- 1. From the *Expense Claims for WO Code [work order code]* screen,
- 2. Click on the *row* of the *expense claim* you wish to *edit*.
- 3. Click on *Edit*.



- 4. When you receive the *Expenses* message to confirm;
  - Are you sure you want to edit this expense for

[employee name] on Work Order [work order code]?

5. Click on Yes.



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- 6. The *Expense Entry* screen will be displayed.
- 7. Make the required changes to the Expense entry.
- 8. Click on *Save*.

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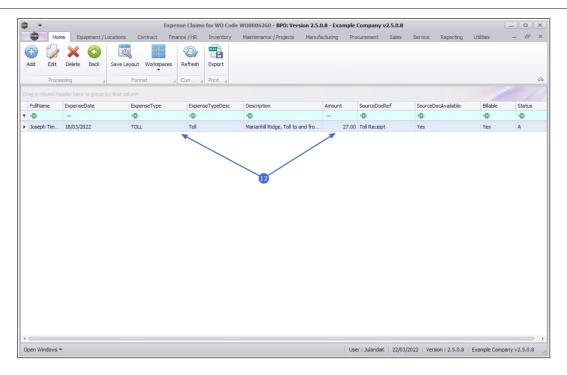


- 9. You will return to the *Expense Claims for WO Code* screen.
- 10. An *Expense Processing* message will display informing you that;
  - Expense Claim on WO: [work order code] complete.
- 11. Click on *OK*.

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12. The updated details can be viewed in the *Expense Claims for WO Code* screen.





### **DELETE AN EXPENSE CLAIM**

- 1. From the *Expense Claims for WO Code [work order code]* screen,
- 2. Click on the *row* of the *expense claim* you wish to *delete*.
- 3. Click on *Delete*.

*Note* that you can only remove an expense with an *A* - Active status.



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- 4. When you receive the *Expenses* message to confirm;
  - Are you sure you want to remove this expense for

[employee name] on Work Order [work order code]?

5. Click on Yes.

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- 6. The *Status* of the deleted expense will change to *I* Inactive.
- 7. Click on **Back** to return to the Work Order Listing screen.

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#### **Related Topics**

• Basic Static Data

MNU.072.017