

# SERVICE

## WORK ORDERS - TRAVEL

Confirm with your supervisor as to whether you will log your travel, or whether the call centre administration will do this.

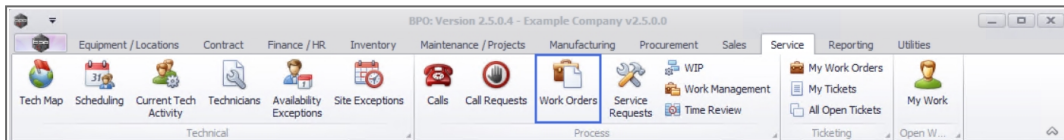


Travel will automatically be updated for clients using Tech Connect.

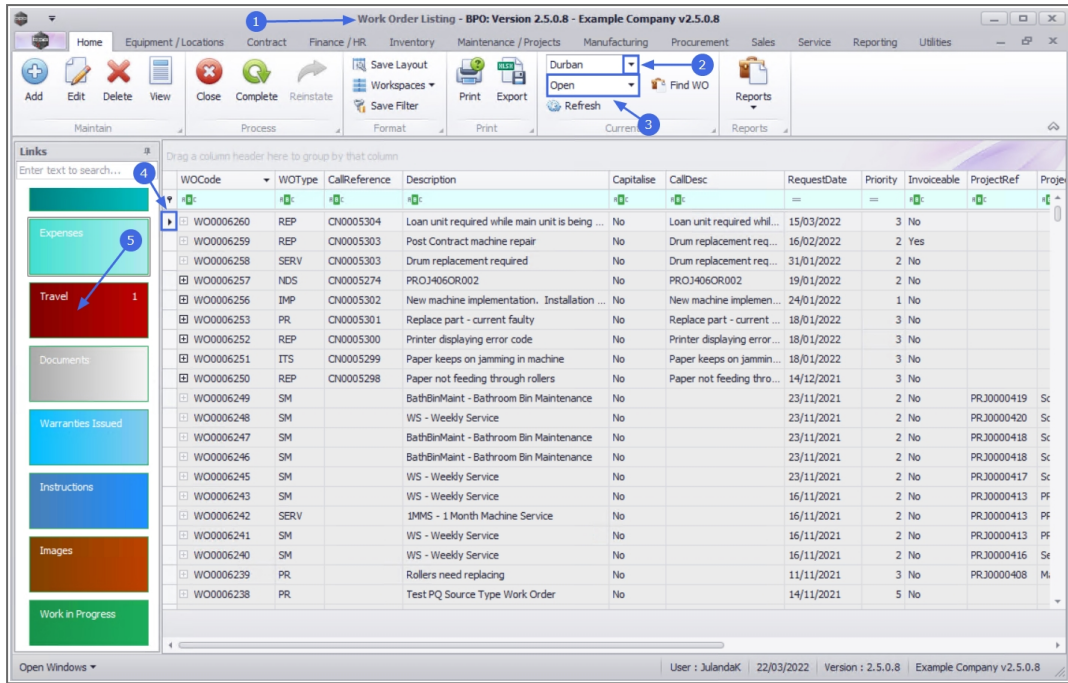
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**Ribbon Access:** *Service > Work Orders*

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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**.
4. Click on the **row** of the **work order** you wish to **add** a travel claim to.
5. Click on the **Travel** tile.



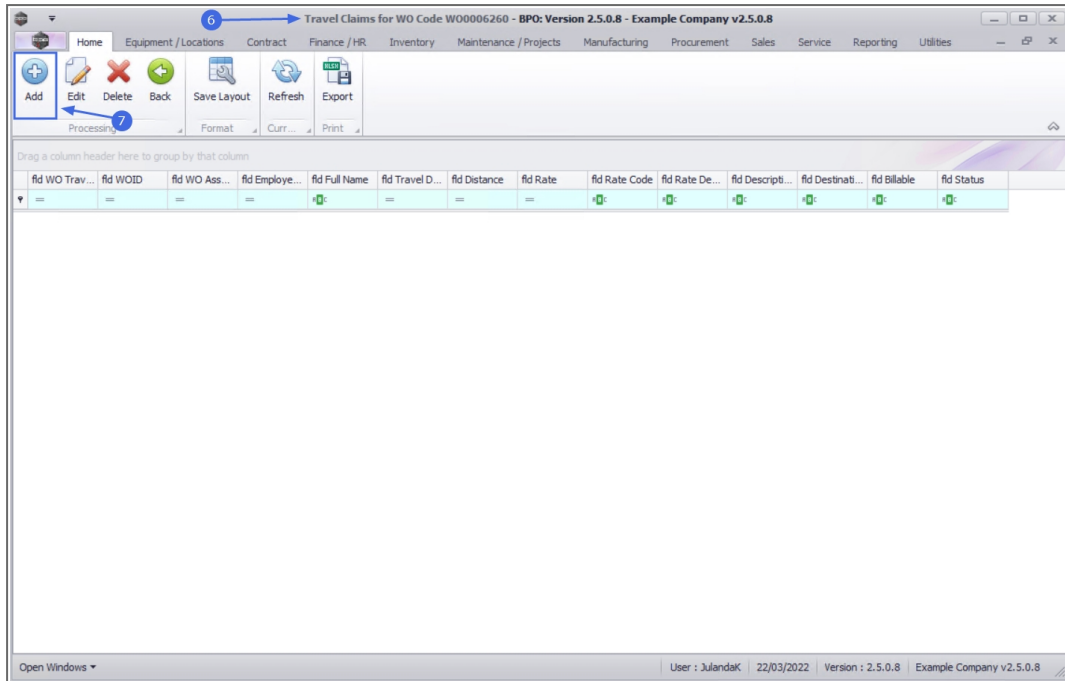
6. The **Travel Claims for WO Code** [work order code] screen will be displayed.

## ADD TRAVEL CLAIM

7. Click on **Add**.



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



8. The **Travel Entry** screen will be displayed.

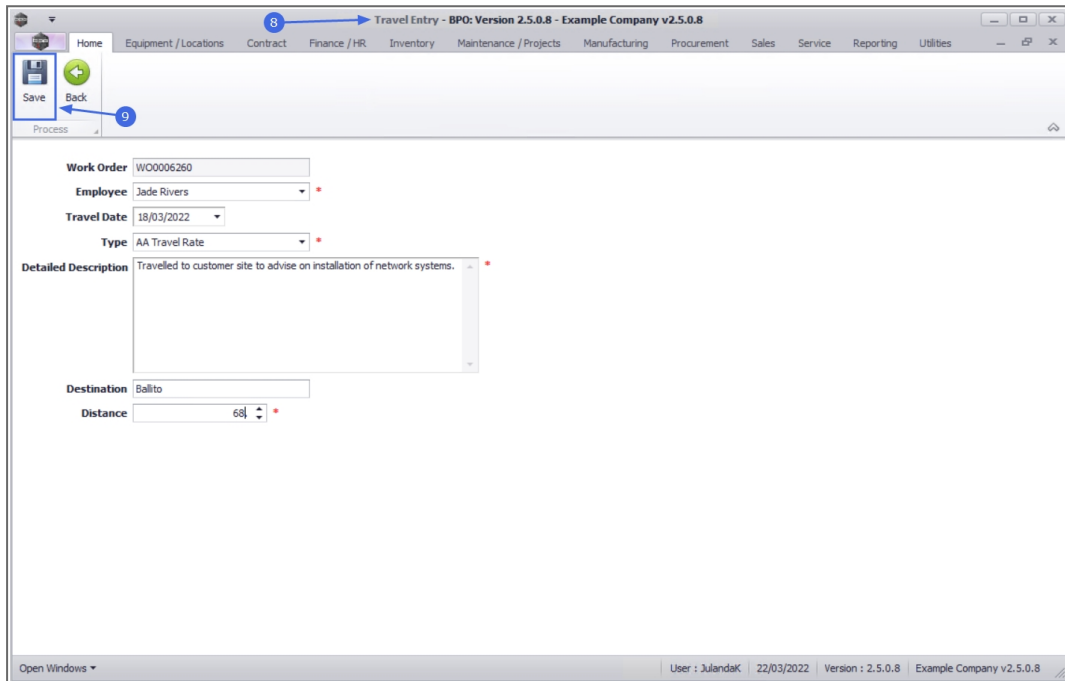


Note that Travel will not be billed from here. Travel Radii or Travel Zones determine a set fee to charge a client for travel within a certain range of kilometres. Refer to [Travel Radii](#)

- **Work Order:** The work order initially selected will be populated in the text box.
- **Employee:** The name of the person currently adding the travel claim will display in the text box. Click on the down **arrow** to select the name of the employee the travel claim is being logged for.
- **Travel Date:** The current date will display in the field. Click on the down arrow to use the calendar function, to select the travel date.
- **Type:** Click on the down arrow to select the type of travel that applies to the travel claim.

- **Detailed Description:** Click to type in a description or reason for travelling.
- **Destination:** Click to type in the travel destination you are claiming for.
- **Distance:** Click to type in or use the arrow indicators to specify the total distance travelled in kilometres

9. When you have finished adding the travel details, click on **Save**.

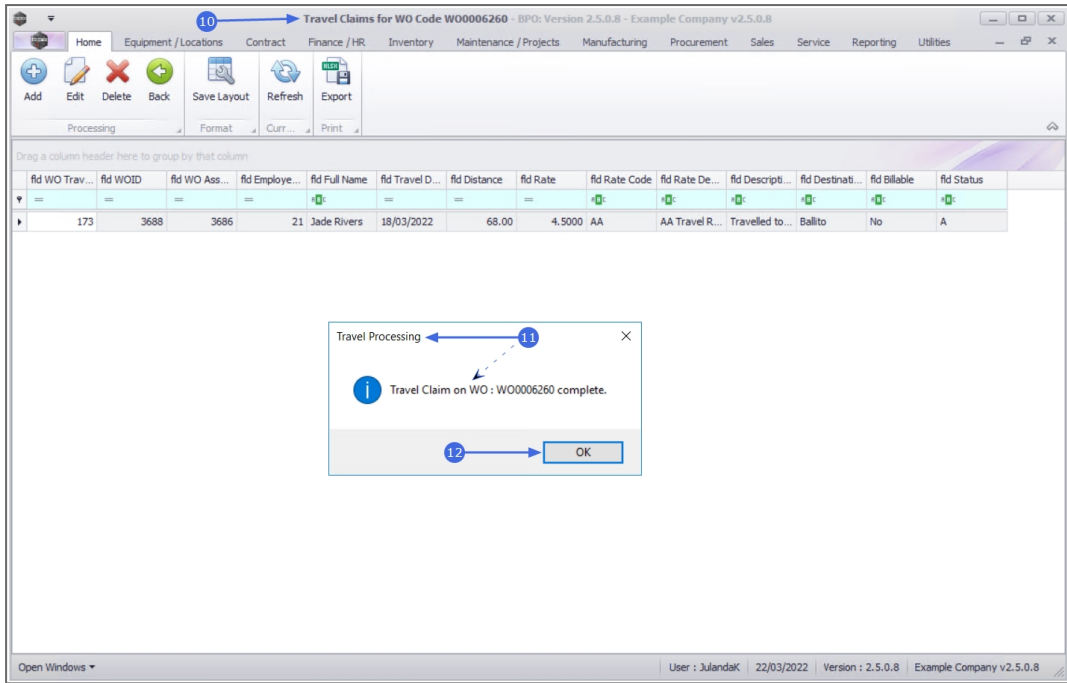


10. You will return to the **Travel Claims for WO Code** screen.

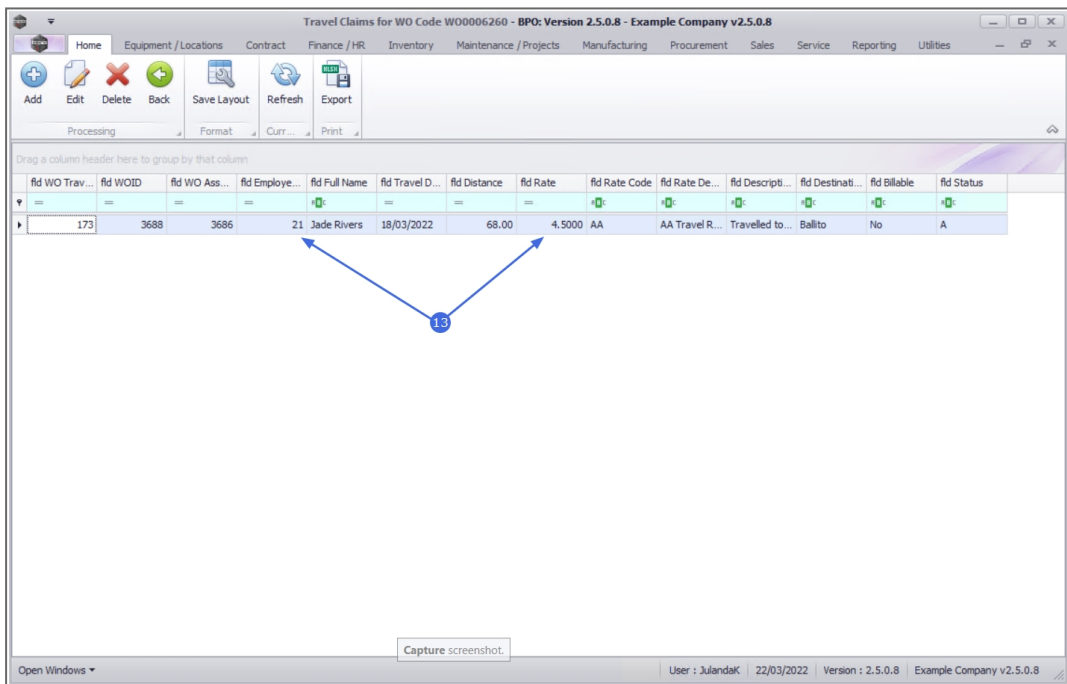
11. When you receive the **Travel Processing** message to confirm that;

- **Travel Claim on WO: [work order code] complete.**

12. Click on **OK**.



13. You can now **view** the travel claim in the *Travel Claims for WO Code* screen.

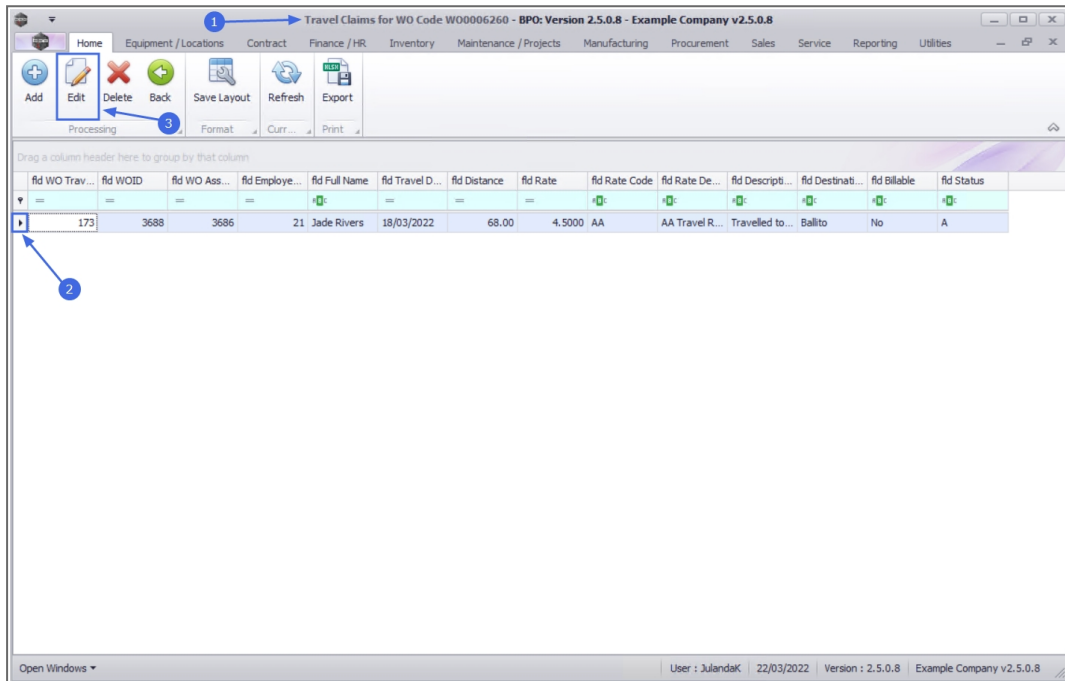


## EDIT TRAVEL CLAIM

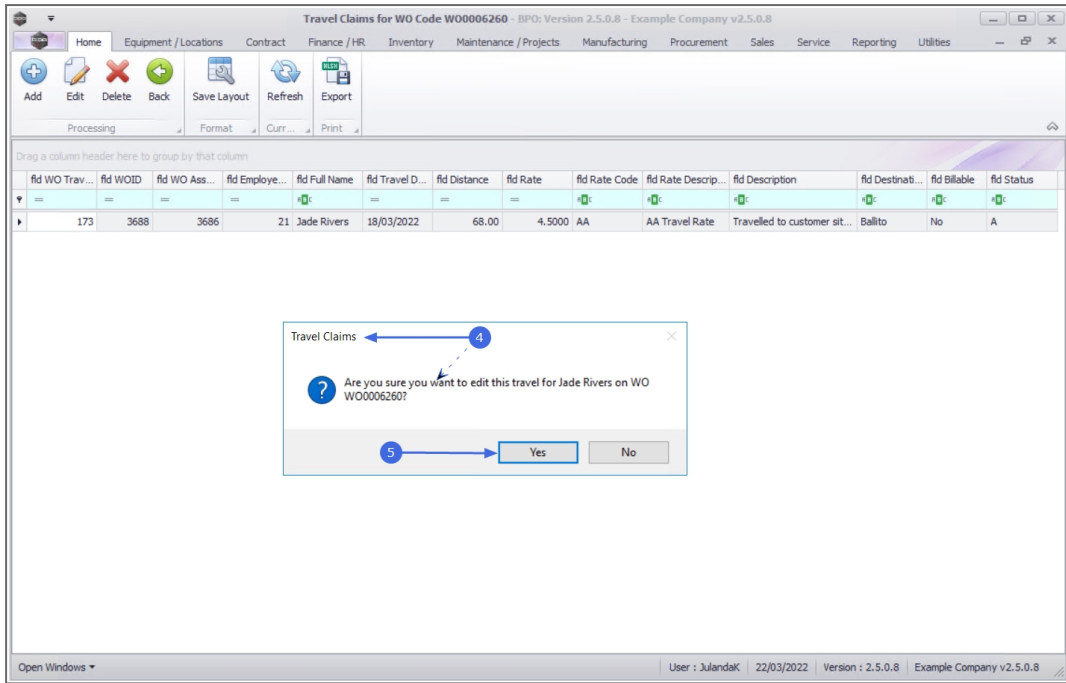
1. From the *Travel Claims for WO Code [work order code]* screen,
2. Click on the *row* of the *travel claim* you wish to *edit*.
3. Click on *Edit*.



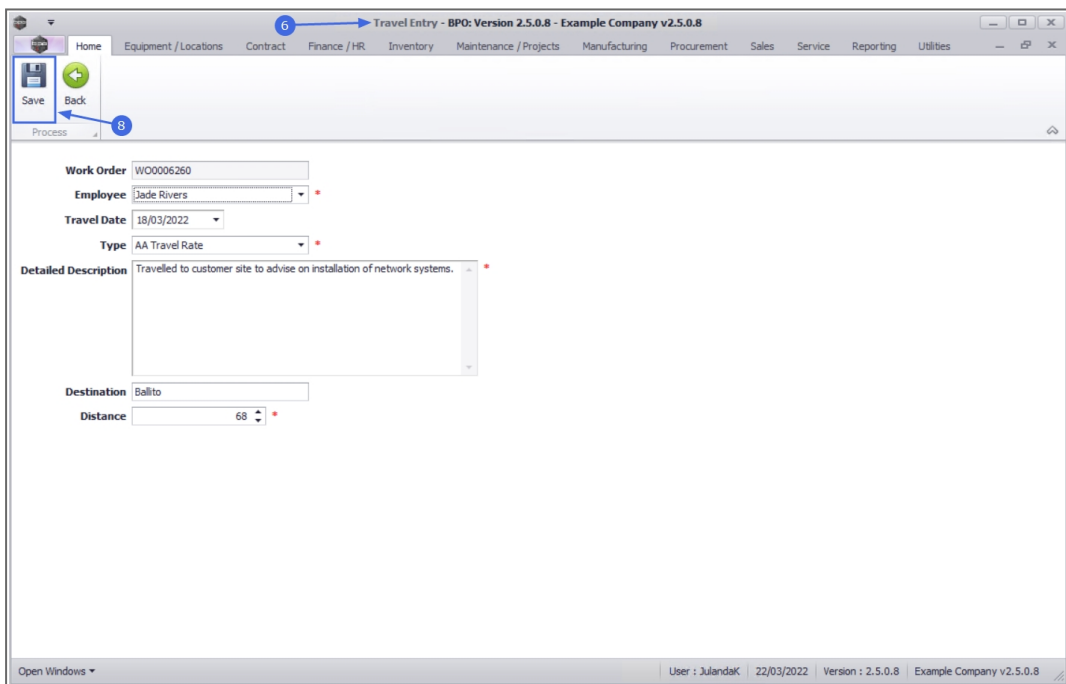
Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.



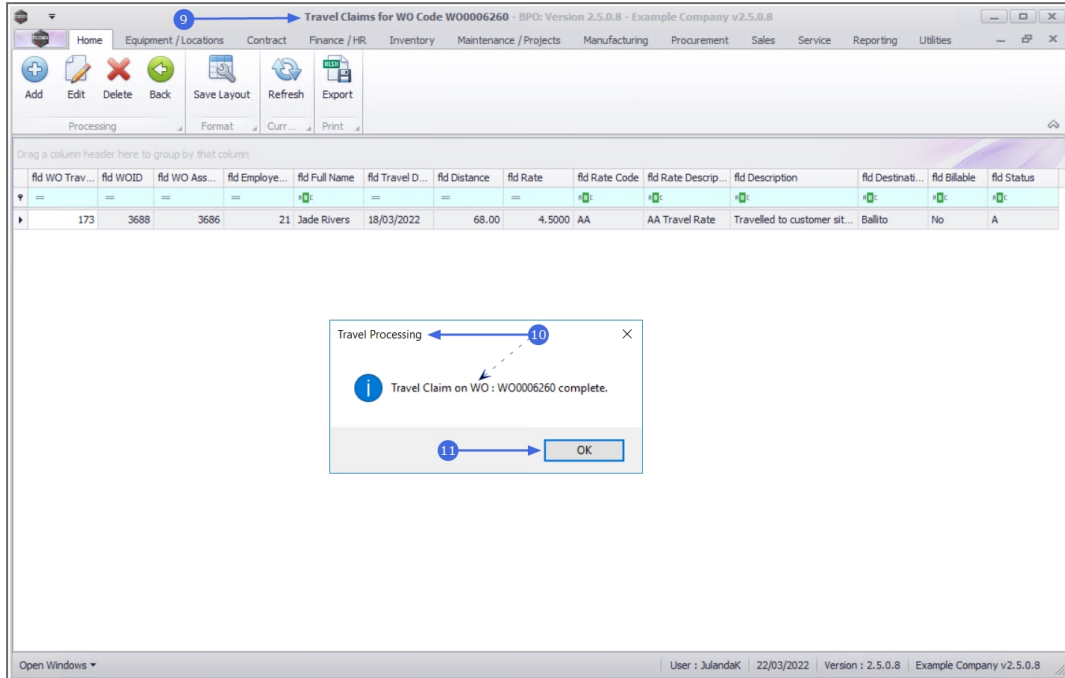
4. When you receive the *Travel Claims* message to confirm;
  - *Are you sure you want to edit this travel for [employee name] on WO [work order code]?*
5. Click on *Yes*.



6. The **Travel Entry** screen will be displayed.
7. Make the necessary changes to the Travel Claim entry.
8. Click on **Save**.



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



12. You can now **view** the updated details in the **Travel Claims for WO Code** screen.



Travel Claims for WO Code W00006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Processing | Format | Curr... | Print

Drag a column header here to group by that column

fid WO Trav...	fid WOID	fid WO Ass...	fid Employee...	fid Full Name	fid Travel D...	fid Distance	fid Rate	fid Rate Code	fid Rate Descrip...	fid Description	fid Destinati...	fid Billable	fid Status
173	3688	3686	21	Jade Rivers	18/03/2022	68.00	4.5000	AA	AA Travel Rate	Travelled to customer sit...	Ballito	No	A

Open Windows | User : JulandaK | 22/03/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

## DELETE TRAVEL CLAIM

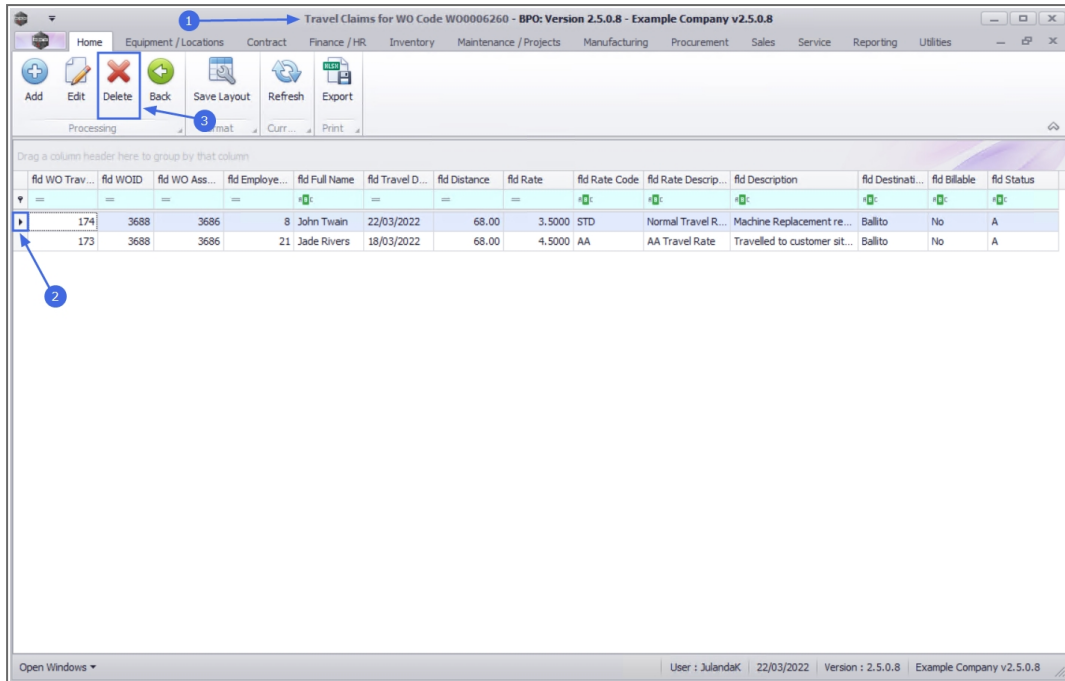


Note that you can only delete a travel claim that has an **A** - Active status.

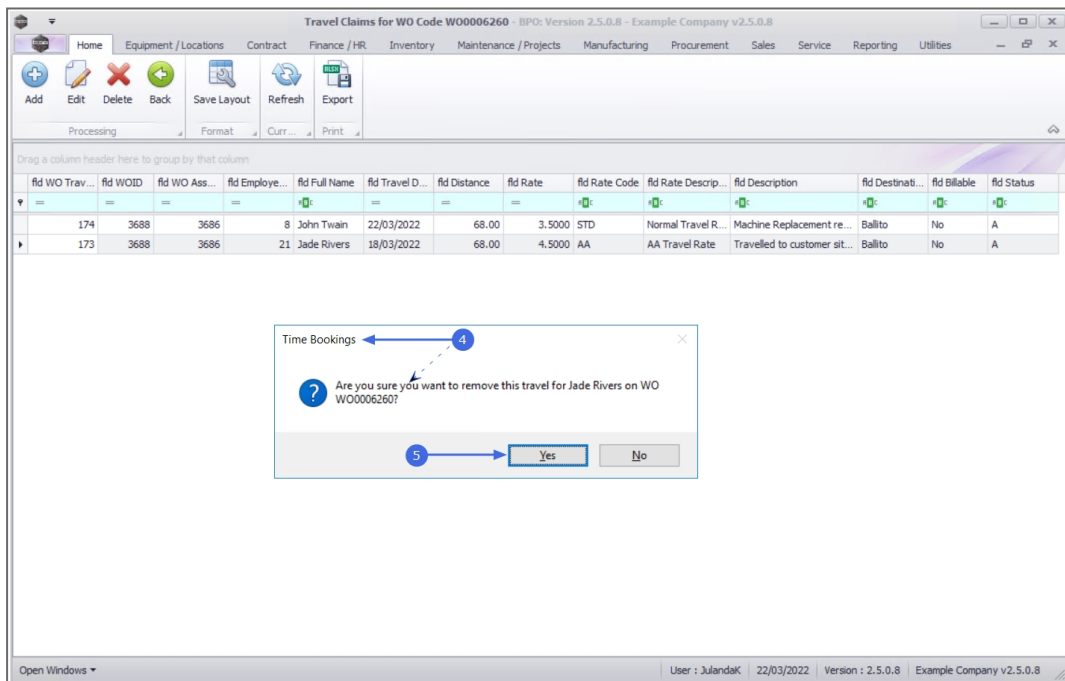
1. From the **Travel Claims for WO Code [work order code]** screen,
2. Click on the **row** of the **travel claim** you wish to **delete**.
3. Click on **Delete**.



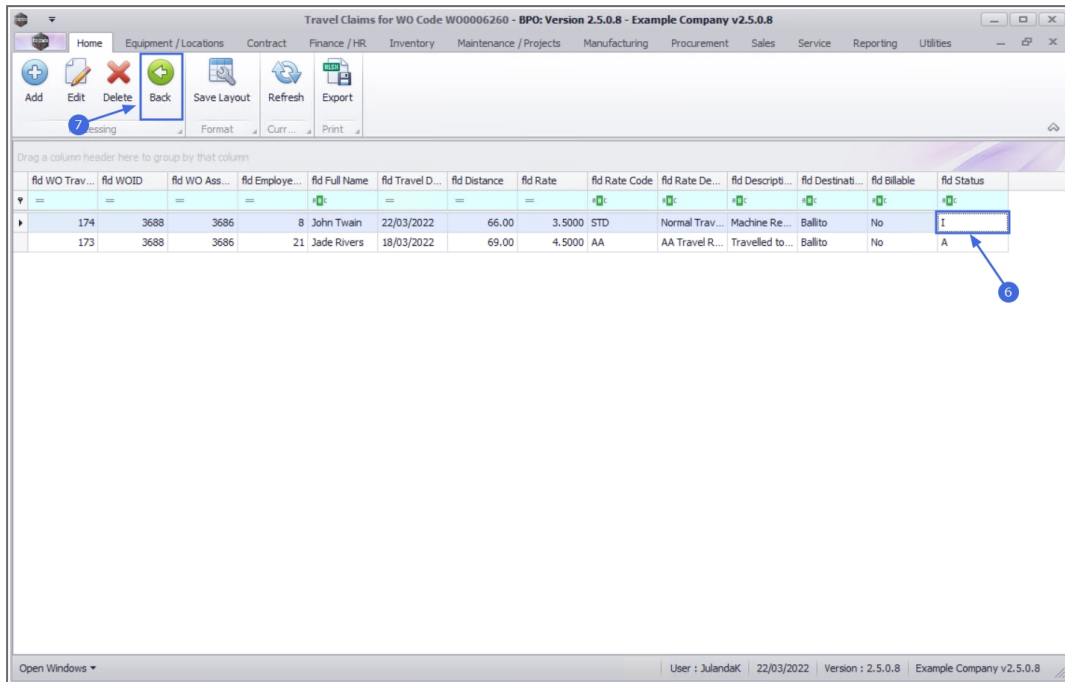
Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.



4. When you receive the **Time Bookings** message to confirm;
  - **Are you sure you want to remove this travel for [employee name] on Work Order [WO number]?**
5. Click on **Yes**.



- The **Status** of the deleted travel claim has been updated to **I** - Inactive.
- Click on **Back** to return to the **Work Order Listing** screen.



MNU.072.018

