

SERVICES

WORK ORDERS - INVOICES

From the **Invoices** tile you can *Add*, *Edit*, add a *Comment and Reference*, *View* and *Print an Invoice*.

The Issues Functions tab will display stock that is issued to the invoice, where it is an OTC Invoice.

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 issued.
 - The example has *Durban* selected.
- 3. Select the *Status* for the work order.
 - The example has *Active* selected.
- 4. Select the *row* of the work order you wish to invoice.
- 5. Click on the *Invoices* tile.



Work Orders - Invoices

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			. WO0006	241	SM		WS - Weekly Service	No		16/11/2021	2 No	PRJ0000
Credit	Notes		. WO0006	240	SM		WS - Weekly Service	No		16/11/2021	2 No	PR.30000

- 6. The *Sales Invoices for Work Order [work order number]* screen will display.
- The *Site* from the Work Order Listing screen will not automatically pull through to the *Sales Invoices for Work Order* screen, click on the down *arrow* to change the *Site* filter.

ADD SALES INVOICE

8. Click on *Add*.

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



🍅 👻 🌔	6	Sales In	voices for Work Ord	er W00006260 - BPC	Version 2.5.0.	8 - Examp	le Company v2.5	.0.8			_
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- 9. "The Add new Customer Invoice screen will display." on page 2
- 10. Complete the *Sales Invoice Header* and the *Financial Header* information.
- 11. Confirm the *Billing and Shipping Addresses*, if these fields were not populated when you entered the Header information.



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- 12. Click on the *Related References* tab to enter the reference information for the Customer Order.
 - The Work Order Reference has been auto populated with the selected Work Order number.
 - When referencing a work order which has stock issued, but not yet invoiced, will auto populate the frame.
- 13. Edit the *Items to be Invoiced* as required.
- Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.



Work Orders - Invoices

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- 15. Click in the *Comments* text box to type in a comment related to the invoice.
- 16. Click on *Save* to save the Customer Invoice details.

For a detailed handling of this topic refer to Invoices - Create Sales Invoice (OTC)



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EDIT SALES INVOICE

- 1. From the Sales Invoices for Customer [customer code] screen,
- Ensure that the correct *Site* has been selected, by clicking on the *arrow* to change the *Site* filter.
 - The *Sales Invoices for Customer* listing screen will be updated with the Customer Invoices for the selected site.
- 3. Select the *row* of the Invoice you wish to edit.
- 4. Click on *Edit*.

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

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- The Edit Customer Invoice [invoice number] screen will display. " on page 2
- Make the required changes to the *Heading Information*, *Addresses* or *Related References* tabs.



- 7. Make the required changes to the Invoice Item frame.
 - To Add a new Invoice item, click on the Select type text box of the first available item line.
 - To *remove* an item, click on the **row** of the item you wish to remove and click on *Delete Item*.
 - Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.

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8. Click on Save.

For a detailed handling of this topic refer to Invoices - Edit Sales Invoice



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You will return to the updated *Sales Invoices for Customer* listing screen.

COMMENT AND REFERENCE

You will be able to <u>add</u> or <u>view</u> the Comment and Reference information for the Customer Invoice from the Work Order Listing Screen.

- 1. From the *Sales Invoices for Customer [customer code]* screen,
- Select the *row* of the Invoice you wish to add or view the Comment and Reference information for.
- 3. Click on *Comment and Reference*.

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



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- 4. "The Invoice No. [invoice number] comment maintenance screen will display." on page 2
- 5. Make the necessary changes to, or add the required information to the Reference or Comment fields.
- Click *OK* to update the Invoice information and to return to the *Sales Invoice for Customer* listing screen.

For a detailed handling of this topic refer to Invoices - Comment and References



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VIEW CUSTOMER INVOICE

You will only be able to <u>view</u> and <u>print</u> the Invoice, <u>no</u> changes can be made in the *View* screen.

- 1. From the *Sales Invoices for Work Order [work order number]* screen,
- 2. Select the *row* of the Invoice you wish to view.
- 3. Click on *View*.



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- 4. The *View Customer Invoice [invoice number]* screen will display.
- 5. Note the *Comment and Reference Number* fields have been updated with the changes made, using the *Comment and Reference* button.
- 6. Click on *Back* to return to the *Sales Invoice for Customer* listing screen.

For a detailed handling of this topic refer to View Tax Invoice



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PRINT INVOICE

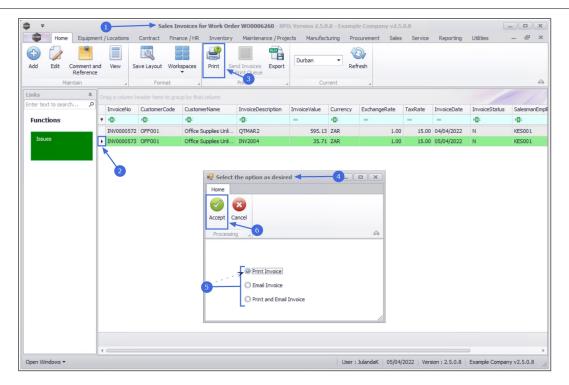
You will be able to *Print, Email* or *Print and Email* the Sales Invoice from the *Sales Invoices for Customer* listing screen or the *View Customer Invoice* screen.

- 1. From the Sales Invoices for Customer [customer code] screen,
- 2. Click on the *row* of the Invoice you wish to print.
- 3. Click on *Print*.
- 4. The *Select the option as desired message* will display.
- 5. Click on the *radio button* of the option you require.

When selecting *Email Invoice*, the invoice will be emailed via the *BPO Email Service* on the server and not from MS Outlook.

- The example has *Print Invoice* selected.
- 6. Click on Accept.

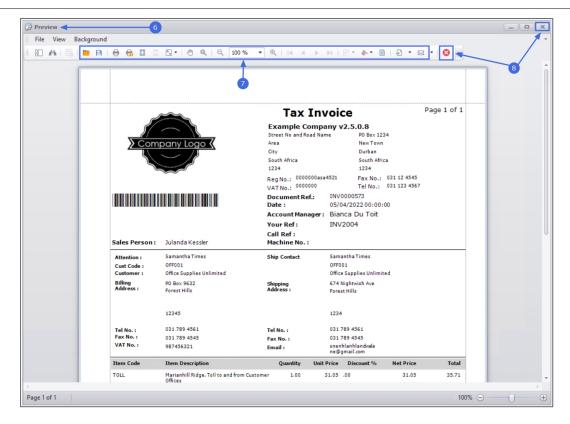




- 6. The Tax Invoice will display in the *Preview* screen.
- From here you can make cosmetic changes to the document, as well as Save, Print, Add a Watermark, Export or Email the Invoice.
- 8. Click on *Close* to return to the *Sales Invoices for Customer* screen.

Refer to <u>Proforma Invoice</u> and <u>Printing a Sales Invoice</u> for a detailed handling of the functions.





SEND INVOICES TO PRINT QUEUE

You can send Invoices to the Print Queue directly from the *Sales Invoices for Customer [customer code]* listing screen, instead of going to the Print Queue Reprint screen. This means that a batch of invoices can be send to the customer.

Print Queue is only available where the status is set to Printed.

- 1. From the Sales Invoices for Customer [customer code],
- 2. Select the Invoice(s) you wish to send to the Print Queue.
 - To select a range of invoices: Click on the *row* of the first Invoice. Hold down the Shift key on your keyboard and click on the *row* of the *last invoice* in your list.

Help v2.5.0.14 - Pg 15 - Printed: 25/06/2024



• To select alternate invoices: Hold down the Ctrl (Con-

trol) key on your keyboard and click on the *row* of each Invoice you wish to include in the selection.

- 3. Click on Send Invoices to Print Queue.
- 4. When you receive the *Print Queue Processing* message to confirm that;
 - The selected items have been sent to the print queue.
- 5. Click on OK.

For a detailed handling of this topic refer to Invoices - Send Invoices To Print Queue

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ISSUES TILE

1. From the *Sales Invoices for Customer [customer code]* listing screen, you can view the stock issued for a selected Invoice.



- 2. Click on the *row* of the Invoice you wish to view the linked *issued items*.
- 3. Click on the *Issues* tile.

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4. The *Issues for Sales Invoice: [invoice number]* listing screen will display.

Print Part Issue Note

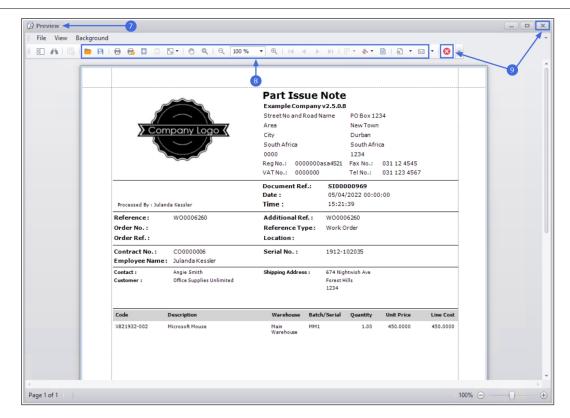
- 5. Click on the *row* of the Part Issue Note you wish to print.
- 6. Click on *Print*.



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- 7. The *Part Issue Note* for the Sales Invoice will display in the Preview screen.
- From here you can make cosmetic changes to the document, as well as Save, Print, Add a Watermark, Export or Email the Part Issue Note.
- 9. Click *Close* to return to the *Issues for Sales Invoice* screen.





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