

SERVICE

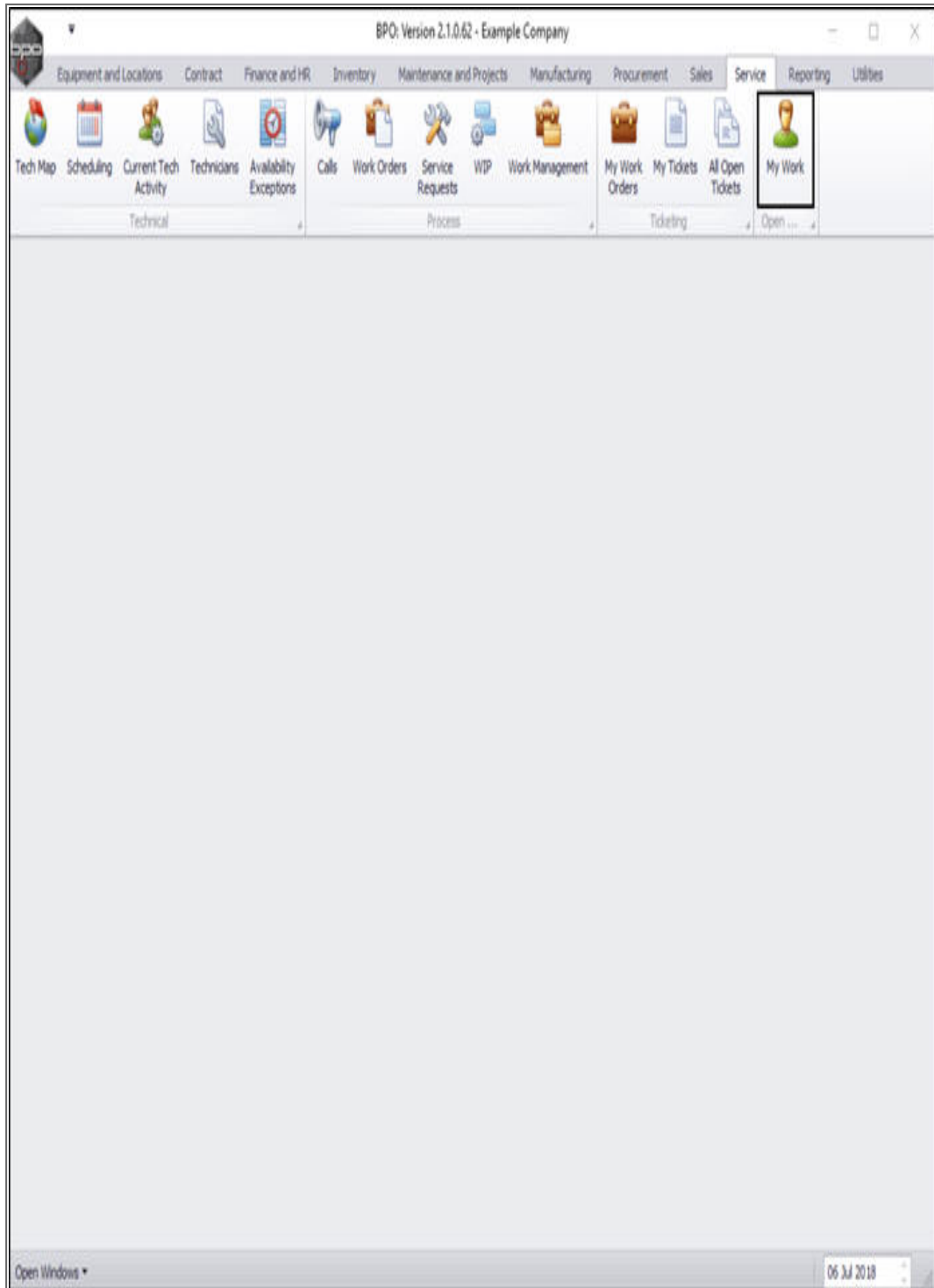
MY WORK – ADD EXPENSES

Expenses can be logged against the work order via the **My Work** screen.

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

A technician who does not use Tech Connect, but has access to BPO will use this method in order to log his expenses.

Ribbon Access: *Service > My Work*



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **log expenses**.
- Click on **Edit**.

My Work - BPO: Version 2.1.0.62 - Example Company

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

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	ScheduledStartDa
W00001592	RSE V1.27.0.0 - Issue - Part...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HCP001	Hope Works	Technical	19 Sep 2017
W00001668	SP240 New Deal.	Durban	O	DR	Default	PRJ0000071	SP240 New Deal.	PMNG	TJA001	Titan Group		24 May 2018
W00001616	Created for production batc...	Durban	O	MN	Manufacturing							28 Nov 2017
W00001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15 May 2018

Open Windows | 06 Jul 2018

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

- Click on the **Expenses** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663' screen. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A sidebar on the left contains several colored tiles: Parts (green), Loans (orange), Swap Outs (green), Meters (teal), Expenses (light blue, highlighted), Travel (red), Documents (grey), and Warranties Issued (blue). The main content area is divided into several sections:

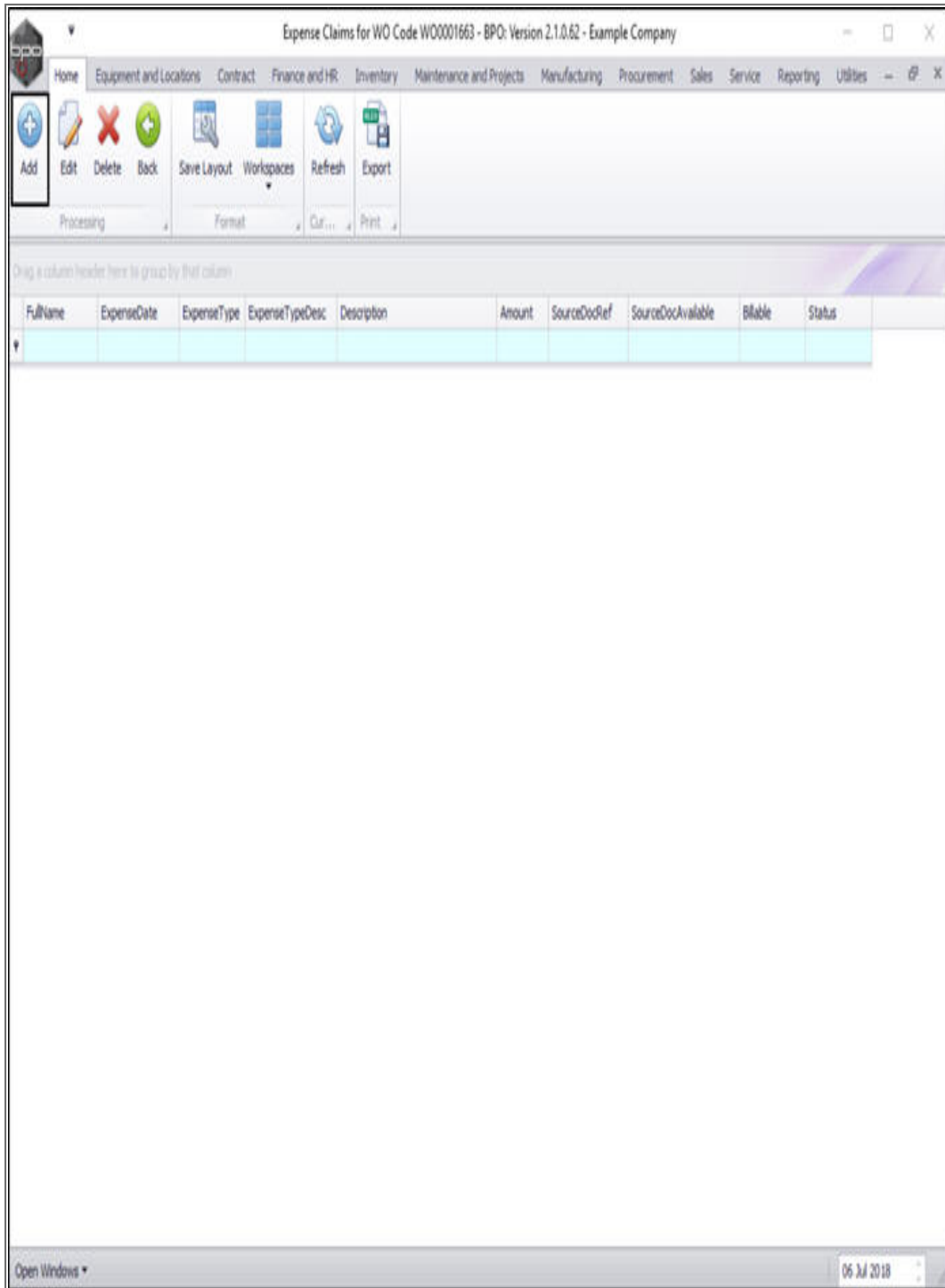
- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:**
 - Functional Location:
 - Equipment:
 - Item: 19-12345
 - Comment:
- Links:**

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
 - Assigned To: Abigail Mine
 - Assigned By: Belinda Sharman
 - Scheduled Start: 15 May 2018 10:40:29
 - Scheduled End: 14 Jun 2018 00:00:00
 - Actual Start: 18 Jun 2018 08:30:00
 - Actual End: 18 Jun 2018 10:30:00
 - Delay Comments: Client not available until the actual start date.
 - Rectification Code: Replaced components
 - Rectification Comments: Parts replaced, machine cleaned and tested. Job complete
 - Completion Date: 18 Jun 2018 00:00:00

At the bottom of the screen, there is a 'Meters' section and a date indicator '06 Jul 2018'.

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

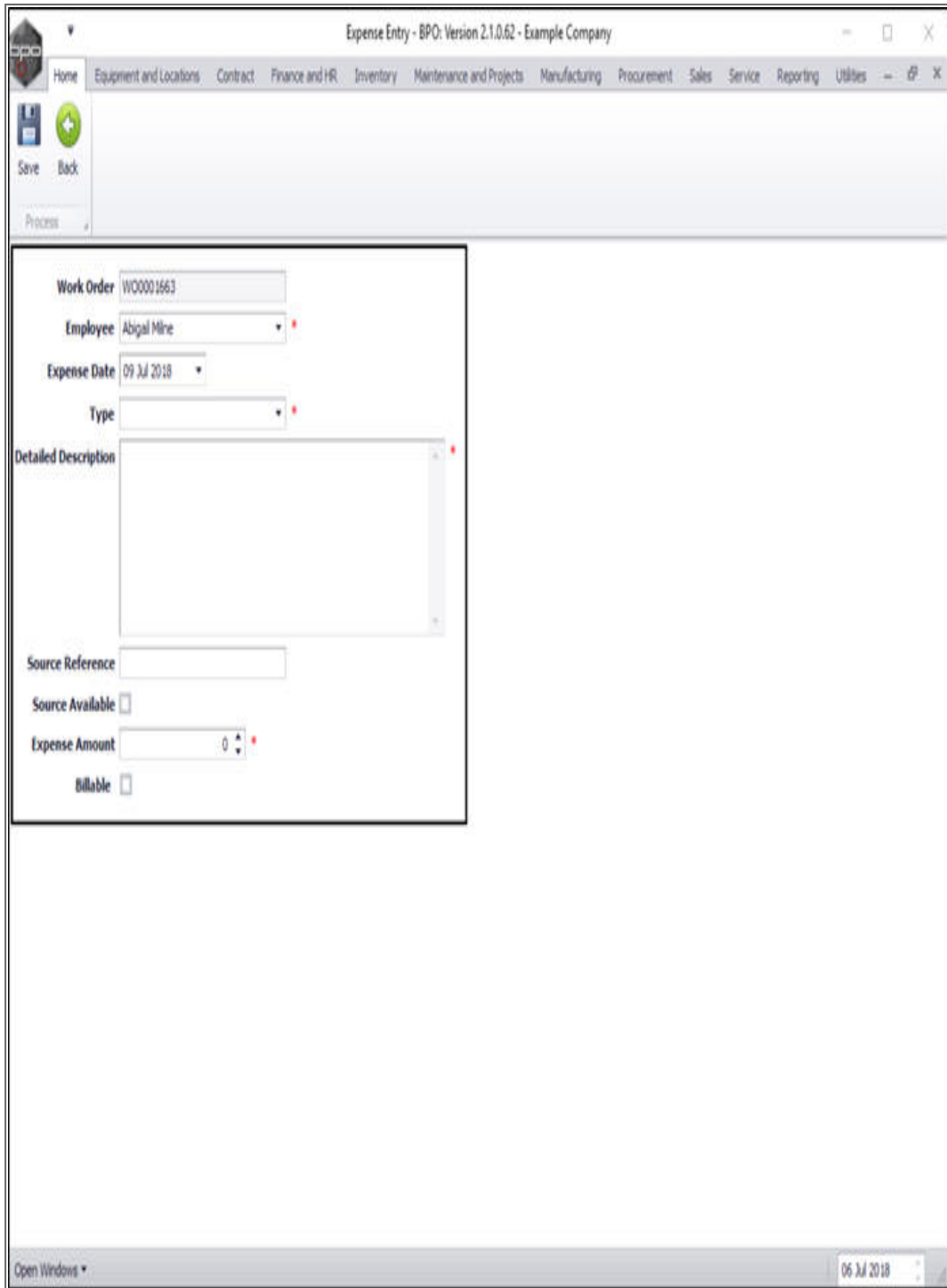
- Click on **Add**.



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

- **Work Order:** This will be auto populated with the number of the work order selected in the previous step.
- **Employee Name:** This will be auto populated with the employee linked to the work order selected in the previous step. You can click on the drop-down arrow and select from the list an alternative employee who incurred the expense if required.
- **Expense Date:** This will auto populate with 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.
- **Type:** Click on the drop-down arrow and select from the list, the type of expense.
 - **Note:** [Additional expense types](#) can be set up, if required.
- **Detailed Description:** Type the in description / reason for the expenses.
- **Source Reference:** Type in the receipt e.g. receipt number if available.
- **Source Available:** Click on this check box if you have the receipt.

- **Amount:** Either type in or use the arrow indicators to select the amount value.
- **Billable:** Click on this check box if this expense should be billable.

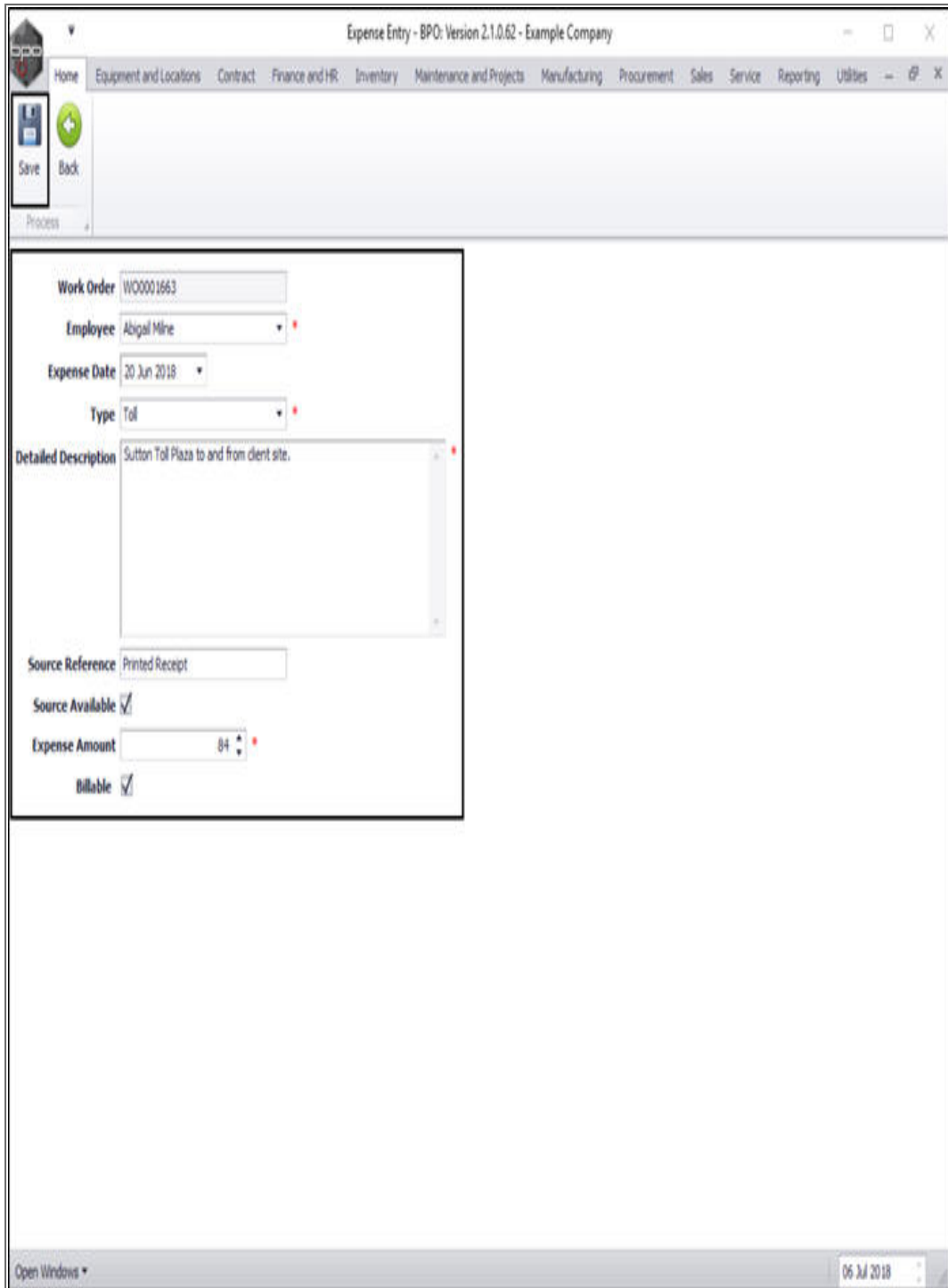


The screenshot shows a software window titled "Expense Entry - BPO: Version 2.1.0.62 - Example Company". The window has a menu bar with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar are "Save" and "Back" buttons, and a "Process" button. The main content area contains a form with the following fields:

- Work Order: W00001663
- Employee: Abigail Mine
- Expense Date: 09 Jul 2018
- Type: (empty dropdown)
- Detailed Description: (empty text area)
- Source Reference: (empty text field)
- Source Available:
- Expense Amount: 0
- Billable:

At the bottom left of the window is "Open Windows" and at the bottom right is a date field showing "06 Jul 2018".

- When you have finished adding the details to the Expense Entry screen, click on **Save**.



The screenshot shows a web application window titled "Expense Entry - BPO: Version 2.1.0.62 - Example Company". The window has a navigation menu at the top with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu are "Save" and "Back" buttons. The main content area contains a form for adding an expense. The form fields are: Work Order (W00001663), Employee (Abigail Mine), Expense Date (20 Jun 2018), Type (Tol), Detailed Description (Sutton Toll Plaza to and from dent site), Source Reference (Printed Receipt), Source Available (checked), Expense Amount (84), and Billable (checked). The window also shows "Open Windows" and a date "06 Jul 2018" at the bottom.

Expense Entry - BPO: Version 2.1.0.62 - Example Company

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

Save Back

Process

Work Order: W00001663

Employee: Abigail Mine

Expense Date: 20 Jun 2018

Type: Tol

Detailed Description: Sutton Toll Plaza to and from dent site.

Source Reference: Printed Receipt

Source Available:

Expense Amount: 84

Billable:

Open Windows

06 Jul 2018

- You will return to the ***Expense Claims for Work Order Code []*** screen.

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

The screenshot shows the 'Expense Claims for WO Code WO0001663 - BPO: Version 2.1.0.62 - Example Company' application. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Workspaces, Refresh, and Export. A data table is displayed with the following columns: FullName, ExpenseDate, ExpenseType, ExpenseTypeDesc, Description, Amount, SourceDocRef, SourceDocAvailable, B/Bable, and Status. One record is visible for 'Abigail Mine' on '20 Jun 2018' with an amount of '84.00'. A dialog box titled 'Expense Processing' is open in the center, displaying an information icon and the message 'Expense Claim on WO : WO0001663 complete.' with an 'OK' button.

FullName	ExpenseDate	ExpenseType	ExpenseTypeDesc	Description	Amount	SourceDocRef	SourceDocAvailable	B/Bable	Status
Abigail Mine	20 Jun 2018	TOXL	Toll	Sutton Toll Plaza to and from dien...	84.00	Printed Receipt	Yes	Yes	A

- You can now view the new expense claim in this screen.

Expense Claims for WO Code W00001663 - BPO: Version 2.1.0.62 - Example Company

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

Add | Edit | Delete | Back | Save Layout | Workspaces | Refresh | Export

Processing | Format | Cur... | Print

Drag a column header here to group by that column

FullName	ExpenseDate	ExpenseType	ExpenseTypeDesc	Description	Amount	SourceDocRef	SourceDocAvailable	Bilable	Status
Abigail Mine	20 Jun 2018	TOLL	Toll	Sutton Toll Plaza to and from client site.	84.00	Printed Receipt	Yes	Yes	A

Open Windows | 06 Jul 2018

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