

## SERVICE

## WORK IN PROGRESS - INVOICE PROJECT

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 Asset*s to return the item to the *Asset warehouse*.

Ribbon Access: Service > WIP

ф. т.	τ         BP0: Version 2.5.0.8 - Example Company ν2.5.0.8											(	_ <b>D</b> X		
	Equipment	/Locations	Contract	Finance / HR	Inventory	Mainten	ance / Projects	Manufactur	ing Proc	urement	Sales Ser	vice Reportin	g Utilities		
٩	31	2	2	2-	i do	6		Ê	X	5	<b>e</b>	Ø	My Work Orders	2	
Tech Map	Scheduling	Current Tech Activity	Technicians	Availability Exceptions	Site Exceptions	Calls	Call Requests	Work Orders	Service Requests	WIP	Work Managemer	nt Time Review	All Open Tickets	My Work	
		Ter	chnical						Process				Ticketing	Open W	4 &

- 1. The *Work in Progress for all work orders* listing screen will be displayed.
- 2. Click on the row of the *item* or *service* you wish to invoice.

Note that if the item you have selected is linked to a *Project*, the *Invoice Project* button in the ribbon will be activated.

3. Click on *Invoice Project*.



## Work in Progress - Invoice Project

WO	Invoice Call Proje		Save Layout	•	Refresh Export							6
g a column head												
DocNo	EventDa 🕶	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc	Cus
R <b>O</b> C	=	8 <b>0</b> 0	8 <b>0</b> 0	s C	* <b>0</b> 0	A D C	=	-	8 <b>0</b> ¢	8 C	R C	• <b>•</b> •
⊞ SI0000966	15/03/2022	INVI	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired	OFI
SI0000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers	HO
SI0000964	28/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2008	1.000	8,000.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BE
SI0000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
B SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BE
SI0000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BE
SI0000963	26/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2009	1.000	8,000.000	Yes	WO0006242	1MMS - 1 Month Machine Service	BEA
B SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	2MS - 2 month service	HO
E SI0000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2000	1.000	8,000.000	Yes	WO0006089	2MS - 2 month service	но
🗉 SI0000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	2MS - 2 month service	HO
🗉 SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	2MS - 2 month service	HO
B SI0000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	1MMS - 1 Month Machine Service	
<ul> <li>SI0000960</li> </ul>	13/12/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	1MMS - 1 Month Machine Service	BE/
· SI0000959	30/11/2021	INVI	INVN	SP-ABI-T	Sprint Toner Black ABI	AB5001	1.000	250.000	Yes	WO0006089	2MS - 2 month service	HO
🗉 SI0000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour	Z101	1.000	3,450.000	Yes	WO0006089	2MS - 2 month service	но
II SI0000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance	WE
II SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	но
🗉 SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
E SI0000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	
SI0000948	19/10/2021	INVI	INVN	SP220	SP220 Machine	SP2020-0100	1.000	5,000.000	Yes	WO0006135	PRJ408/1	OF

## 4. The Add new Customer Invoice screen will display.

You will note that the *Customer Details* would have been populated.

You will need to add a *Reference No.*, as well as search for the correct *Contact Name, Billing Customer* and *Billing Contact*, if <u>more</u> <u>han one</u> has been set up for the customer.

5. When you have finished editing the details on this screen, click on *Save* 



-	Maintain 5	Format													4
Cu	stomer Name	Bearing and Shoe		P	Reference PRJ408/B	IS001		Billing addres	s						
1	Contact Name		×	1.	Status New			PO Box 1234 New Town		^ م					
		Type Class Comm	ercial		Date & Time 14/04/20	22 • 11:09:27		Shipping addr	arr	+					
		Julanda Kessler		<u>·</u> · •			1	PO Box 1234	<b>C33</b>	<u>٭</u> م	1				
	-	Bearing and Shoe			lling Contact John Bear	ring	* 9	New Town Forest Hills							
lnv		South African Rar	hd		change Rate		1 🗘 *	rorestrills							
	Tax Rate	15.00	•	15 🗘	Suppr	ress Line Detail on	Print	Addresses Re	elated Refere	nces					
5	SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Departn
7		-	R C	n 🖬 c	n 🖬 c	* <b>0</b> ¢	a 🖬 c	-	-	-	-	-	-	-	1 <b>0</b> 0
•		Parts	12-098765	SP 19-12 Black T	SP 19-12 Black Toner	Main Warehouse		1.000	361.765	0.000	0.000	420.000	420.000	15.000	
		Parts	AM-Copier	AB Marv Multi C	AB Marv Multi Copier 1	George_Whse	AM2009	1.000	8,000.000	15.000	0.000	9,200.000	9,200.000	15.000	
		Parts	ACR-01	Acer copier out	Acer copier outer shell	Main Warehouse	ac34215	1.000	300.000	0.000	0.000	345.000	345.000	15.000	
		Parts	ACR-01	Acer copier out	Acer copier outer shell	Main Warehouse	f1234	1.000	300.000	0.000	0.000	345.000	345.000	15.000	
		Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	11111	3.000	100.000	0.000	0.000	115.000	115.000	15.000	
		Parts	AM-Copier	AB Marv Multi C	AB Marv Multi Copier 1	Main Warehouse	AM2008	1.000	8,000.000	15.000	0.000	9,200.000	9,200.000	15.000	

6. You will return to the *Work in Progress for all work orders* screen.

To view the invoice and further invoice processing, refer to Introduction to Sales Invoices.

Home	Equipment	/Locations	Contract	Finance / HR	Inventory Main	ntenance / Projects	Manufa	cturing I	Procureme	ent Sales	Service Reporting Utilities -	. 8 x
eturn Invoice WO	Invoice Invoi Call Proje		Save Layout	Workspaces	Refresh Export							
Pro	cessing		Form	nat .	Curr 4 Print 4							6
DocNo	EventDa •	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc	Cust
R <b>O</b> C	=	R C	8 <b>0</b> 0	s C	* <b>D</b> :	R C	=	-	e <b>l</b> ic	REC	4 <b>0</b> c	8 <b>0</b> 0
E SI00000966	15/03/2022	INVI	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired	OFI
E SI0000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour .	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers	но
III SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	2MS - 2 month service	HO
3 SI0000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1	AM2000	1.000	8,000.000	Yes	WO0006089	2MS - 2 month service	HO
B SI0000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	2MS - 2 month service	HO
SI0000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	2MS - 2 month service	HO
SI0000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	1MMS - 1 Month Machine Service	
B SI0000959	30/11/2021	INVI	INVN	SP-ABI-T	Sprint Toner Black ABI	AB5001	1.000	250.000	Yes	WO0006089	2MS - 2 month service	HO
E SI0000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour .	. Z101	1.000	3,450.000	Yes	WO0006089	2MS - 2 month service	HO
E SI0000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance	WE
B SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	но
B SI0000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
SI0000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	
SI0000948	19/10/2021	INVI	INVN	SP220	SP220 Machine	SP2020-0100	1.000	5,000.000	Yes	WO0006135	PRJ408/1	OFI
B SI0000948	19/10/2021	INVI	INVN	SP220	SP220 Machine	SP2020-0101	1.000	5,000.000	Yes	WO0006135	PRJ408/1	OFI
SI0000946	12/10/2021	INVI	INVN	2020-147K	Black toner SP2020		2.000	396.111	Yes	WO0000526	AirMaint - Airfreshner Maintenance	TIA
E SI0000945	07/10/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006131	1818-1-1 - Check network requirements	HO
E SI0000943	05/10/2021	INVI	INVN	9855632	Air Freshner		1.000	22.641	No	WO0000371	WS - Weekly Service	
	05/10/2021	INVI	INVN	19-687	Drum	12345	1.000	1,000.000	No	WO0000202	Drum replacement required	HO
SI0000944	04/10/2021	INVI	INVN	SP2020	SP2020 Sprint Colour .	. cheesv1	1.000	4,500,000	Yes	WO0000215	New machine	SAI

MNU.077.004