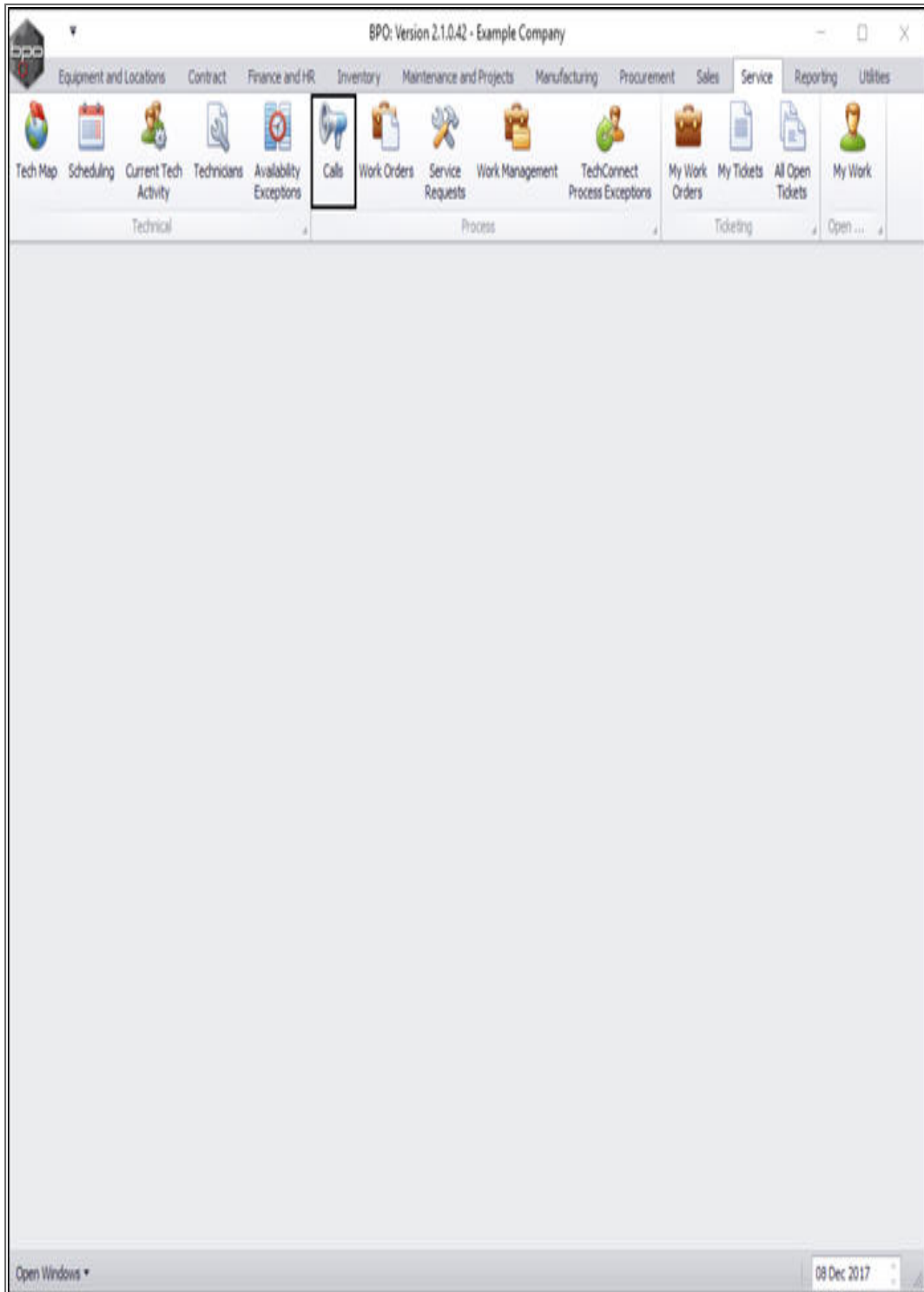


SERVICE

CALLS - ADD EXPENSES

If you cannot add expenses due the message 'No Items to select from' then expenses have not yet been set up. Refer to [Expense Allocation and Setup](#).

Ribbon Access: *Service > Calls*



The **Call Listing** screen will be displayed.

- Select the **site** and **status**.
 - In this image, **Durban** has been selected as the **site** and the **status** has been set to **New**.

Call Listing - BPO: Version 2.1.0.43 - Example Company

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

22 May 2017 Default Save Layout My Call Close Complete Hold Pending Release Print Reports

22 Dec 2017 Refresh My Calls Workspaces Assign Start

Maintain State Format Work Process Print Re...

Find Filter

Drag a column header here to group by that column

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throu...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-10
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per ...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	an123
CH0000493	15 Jun 2017	12:28:25	Test OriSte Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-8529
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-8529
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		tes0978
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-3020
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-8529
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

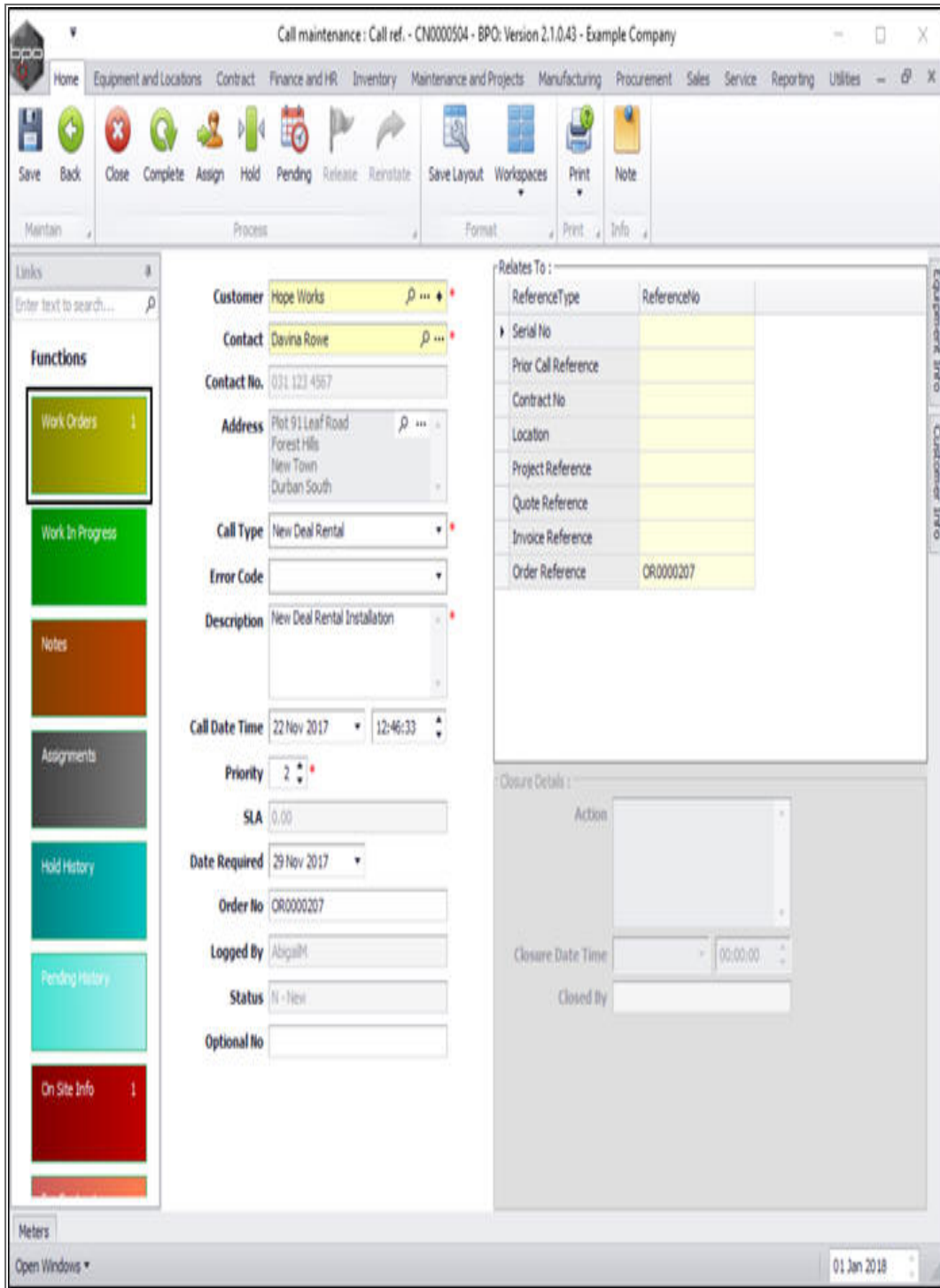
Open Windows 01 Jan 2018

- Click on the **row selector** in front of the **call** you wish to **log expenses** for.
- Click on **Edit**.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	Serial
CH0000507	12 Dec 2017	13:17:05	Paper not feeding through r...	REP	Repair	New	UnAssigned		2020
CH0000504	22 Nov 2017	12:46:33	New Deal Rental Installation	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and return...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - inter...	PR	Parts Require...	New	UnAssigned		2020
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to asset ...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-96
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per WO	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call per ...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	sin12
CH0000493	15 Jun 2017	12:28:25	Test OnNote Totals for Pric...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with the ...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:15	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-85
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Require...	New	UnAssigned		20-85
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	28 May 2017	15:03:59	Test saving a call linked to a ...	PR	Parts Require...	New	UnAssigned		14-96
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - Fault...	PR	Parts Require...	New	UnAssigned		2020
CH0000475	25 May 2017	09:18:05	Swap out - asset on a short ...	DR	Select Call Type	New	UnAssigned		Its19
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020
CH0000472	24 May 2017	14:38:10	Contract Service Test v2.1.0.5	SERV	Service	New	UnAssigned		2020
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request for ...	REP	Repair	New	UnAssigned		20-85
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1.0.5	REP	Repair	New	UnAssigned		20-85

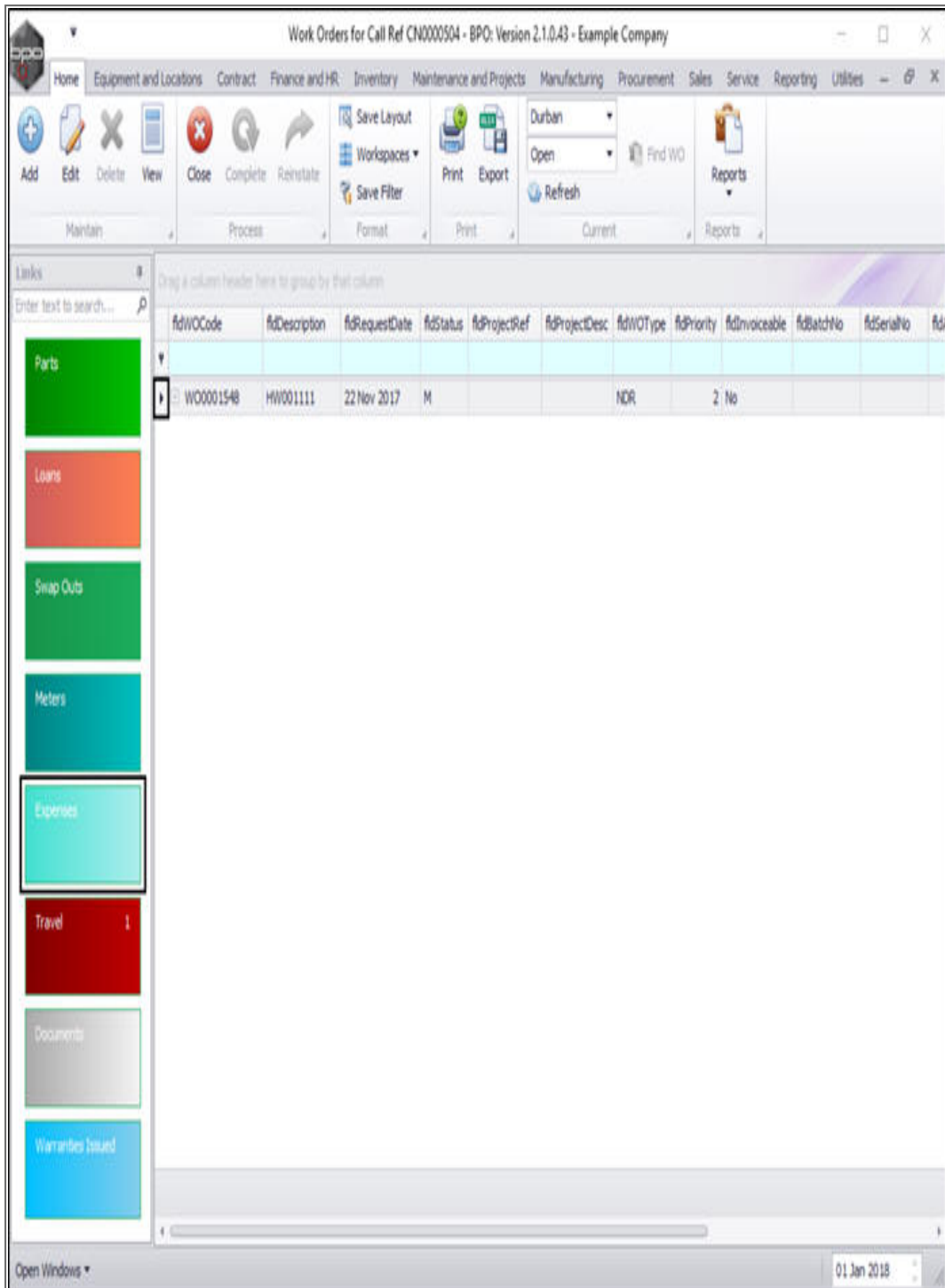
The **Call maintenance screen: Call ref. - []** screen will be displayed.

- Click on the **Work Orders** tile.

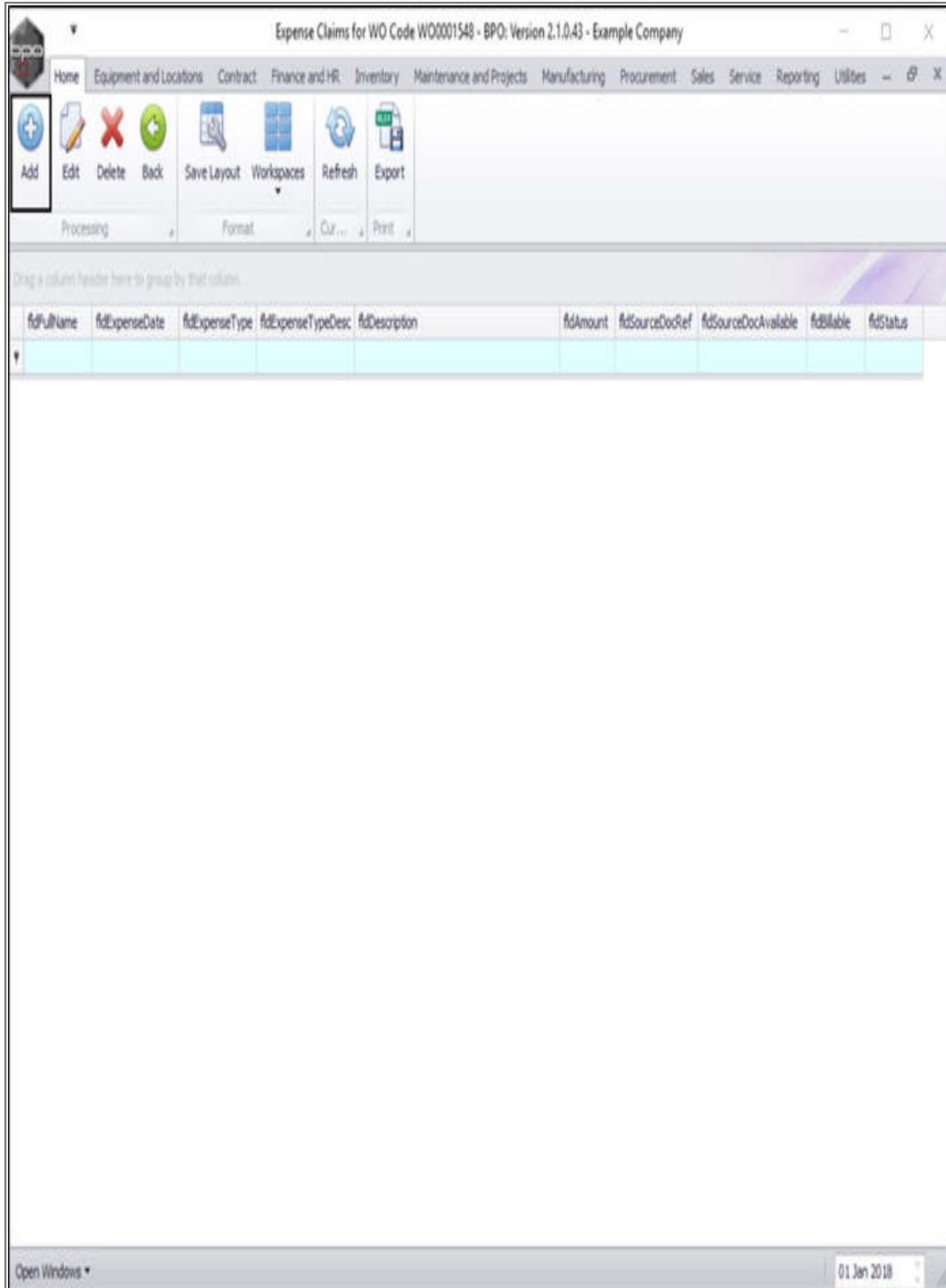


The **Work Orders for Call Ref []** screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to **log expenses** for.
- Click on the **Expenses** tile.



- The **Expense Claims for WO Code []** screen will be displayed.
- Click on **Add**.



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

- **Work Order:** This will auto populate according to the work order initially selected.
- **Employee:** This will auto populate with the name of the person currently logged on to the system but you can click on the drop down arrow and select an alternative employee from the menu if required.
- **Expense Date:** This will default to the current date. You can 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 menu the type of expense.
- **Detailed Description:** Type in a description for the expenses.
- **Source Reference:** Type in the reference number of the receipt if applicable.
- **Source Available:** Select this checkbox if the receipt is available.
- **Expense Amount:** Type in or use the arrow indicators to select the total amount of the expense.
- **Billable:** Select this check box if the service is billable.
 - **Note:** This will be set to billable by default, unless the expense is linked to the contract as an inclusion.

Expense Entry - BPO: Version 2.1.0.43 - 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 WO0001548

Employee Sarah Milder

Expense Date 02 Jan 2018

Type

Detailed Description

Source Reference

Source Available

Expense Amount 0

Billable

Open Windows 01 Jan 2018

- When you have finished editing the **Expense Entry** screen, click on **Save**.

Expense Entry - BPO: Version 2.1.0.43 - 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: WO0001548

Employee: Sarah Milder

Expense Date: 02 Jan 2018

Type: Toll

Detailed Description: Mariannhill Toll outbound and return.

Source Reference: Toll Receipt

Source Available:

Expense Amount: 30

Billable:

Open Windows | 01 Jan 2018

- You will return to the ***Expense Claims for WO 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 W00001548 - BPO: Version 2.1.0.43 - Example Company' window. 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 table displays expense claim data with columns: fdFullName, fdExpenseDate, fdExpenseType, fdExpenseTypeDesc, fdDescription, fdAmount, fdSourceDocRef, fdSourceDocAvailable, fdBillable, and fdStatus. One row is visible for Sarah Milder on 02 Jan 2018, with a toll amount of 30.00. A modal dialog box titled 'Expense Processing' is open, displaying an information icon and the message 'Expense Claim on WO : W00001548 complete.' with an 'OK' button.

fdFullName	fdExpenseDate	fdExpenseType	fdExpenseTypeDesc	fdDescription	fdAmount	fdSourceDocRef	fdSourceDocAvailable	fdBillable	fdStatus
Sarah Milder	02 Jan 2018	TOLL	Toll	Mariannhill Toll outbound and return.	30.00	Toll Receipt	Yes	Yes	A

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

Expense Claims for WO Code W00001548 - BPO: Version 2.1.0.43 - 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

fdFullName	fdExpenseDate	fdExpenseType	fdExpenseTypeDesc	fdDescription	fdAmount	fdSourceDocRef	fdSourceDocAvailable	fdBillable	fdStatus
Sarah Milder	02 Jan 2018	TOLL	Toll	Mariannhill Toll outbound and return.	30.00	Toll Receipt	Yes	Yes	A

Open Windows | 01 Jan 2018

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