SERVICE

CALLS – WORK IN PROGRESS

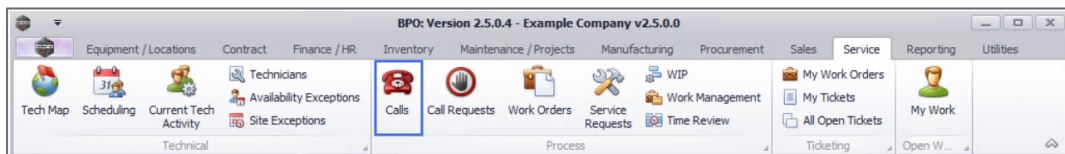The Work in Progress (WIP) screen displays:

- **Parts** that have been issued or
- **Third Party Services** that have been received

 but have <u>not yet</u> 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*.
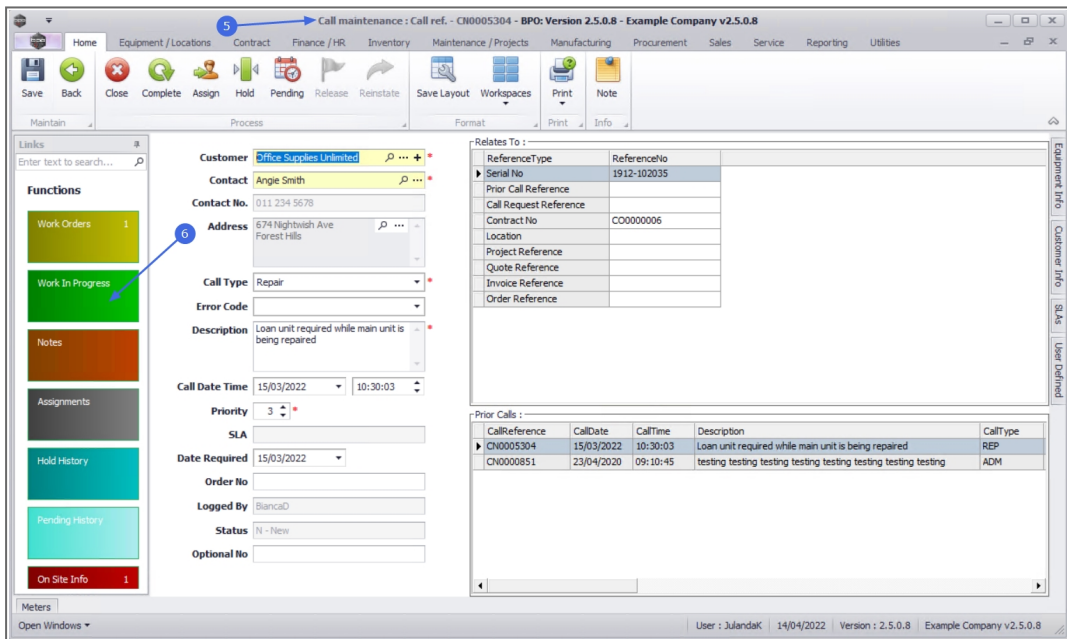

Ribbon Access: *Service > Calls*

1. The *Call Listing* screen will be displayed.
2. Select the *Site* and *Statu*s.
   - The example has *Durban* as site and the *New* status selected.
3. Click on the *row* of the call you wish to view the Work in Progress for.
4. Click on *Edit*.
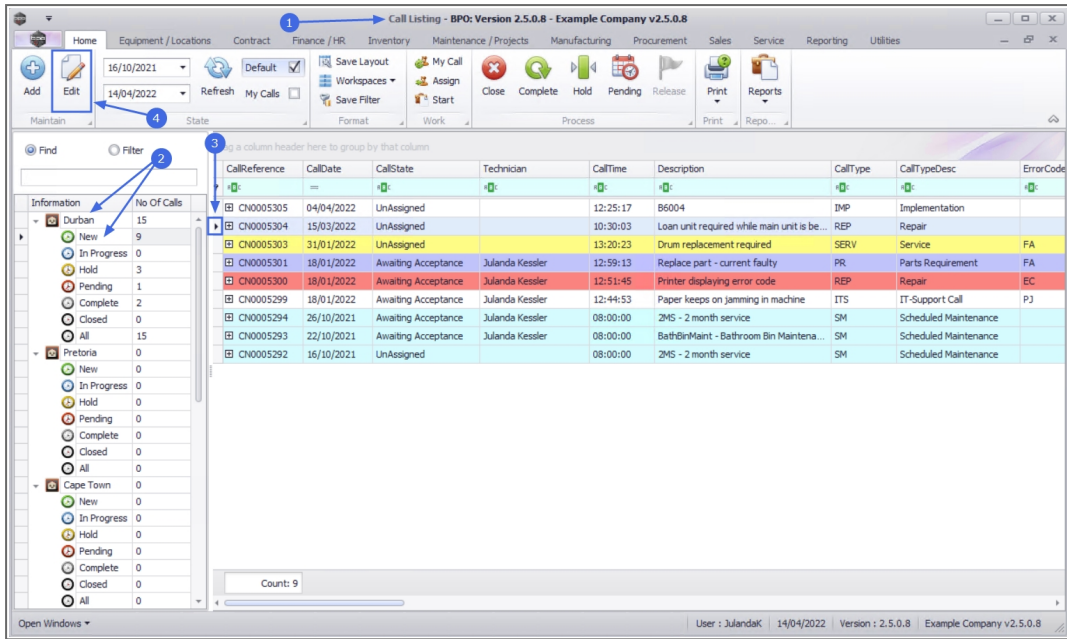
5. The *Call maintenance : Call ref - [call reference number]* screen will display.

6. Click on the *Work In Progress* Tile.

7. The *Work in Progress for Call, Ref No : [call ref. number]* screen will be displayed.

> The screen displays both stock or internal assets that have been issued, as well as Third Party Services that have been received
>
> If the items or services are billable, then they have not been invoiced.
>
> If the items are non-billable, the linked work order, call or project has not yet been closed.

8. The *Doc No* column displays the, Work in Progress reference number for a *part* with a *SI* prefix to the number.
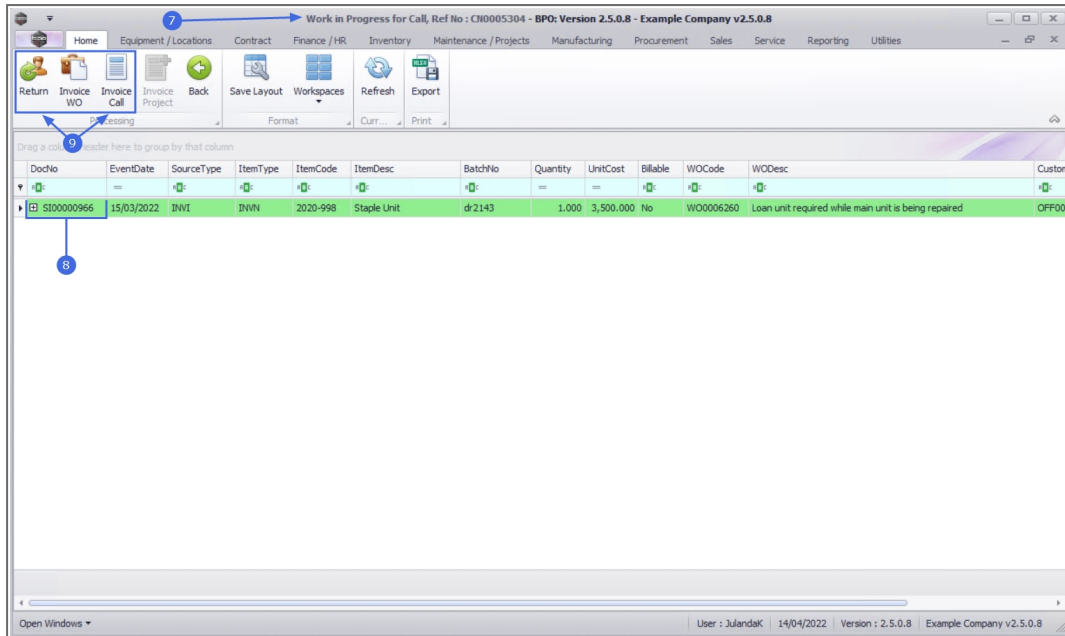   - A **service** Work in Progress will display as *SERVICE*.

WIP PROCESSING

9. From this screen, you can:
   - Do a *Return Request* for an item or service,
   - *Invoice* a *work order*, or
   - *Invoice Call*.

> 🖊 The *Invoice Project* button has been **greyed** out indicating that a Project cannot be Invoiced from this screen.
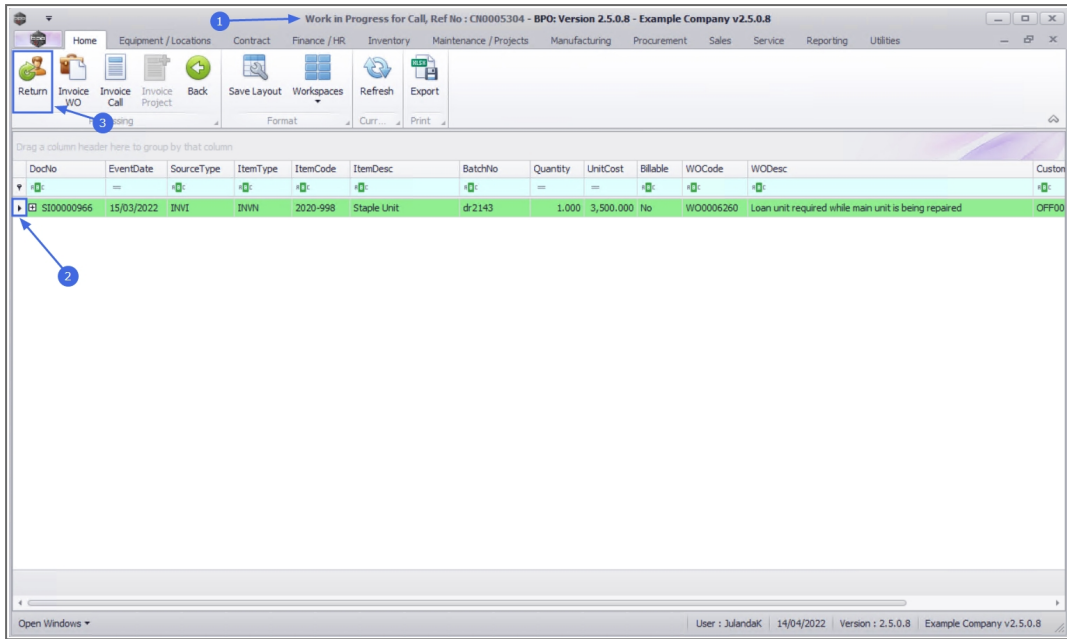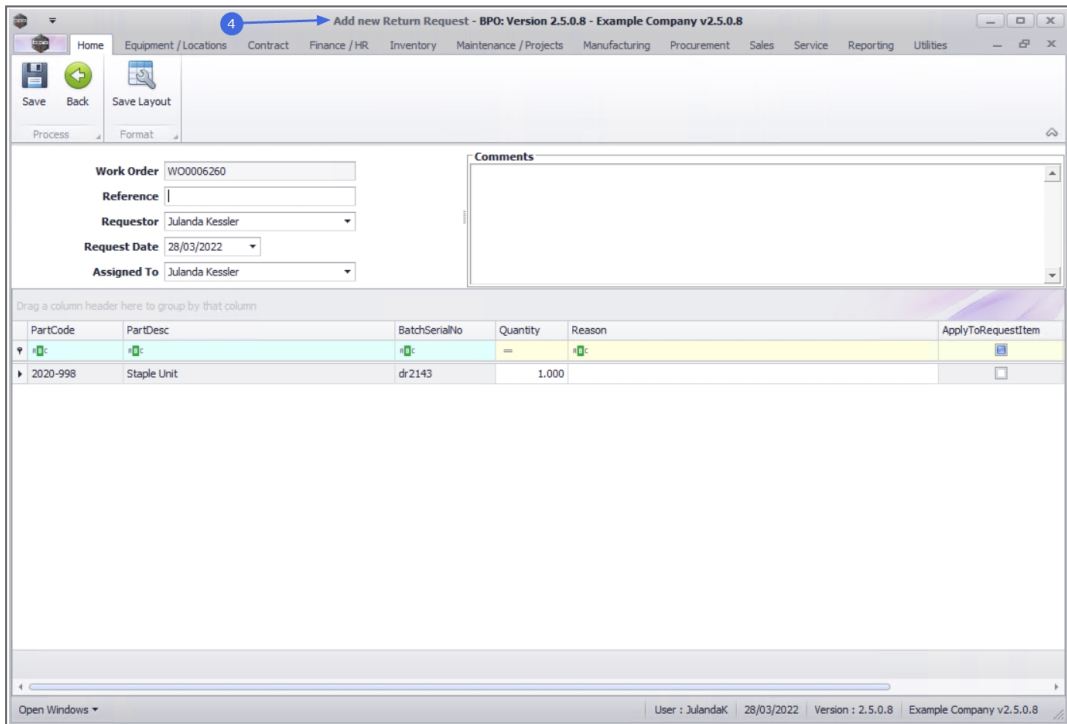
RETURN REQUEST

1. From the *Work in Progress for Call, Ref No: [call ref number]* screen,
2. Click on the **row** of the Service or Part you wish to return.
3. Click on the *Return* button.

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

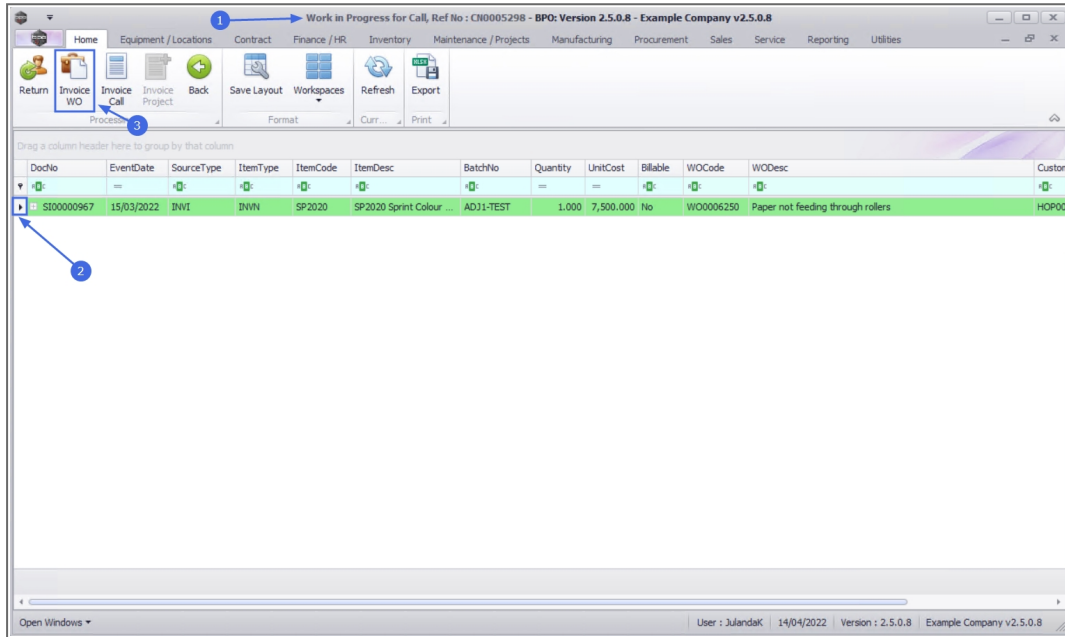4. **"The Add new Return Request screen will be displayed. " on page 2**

INVOICE WORK ORDER

1. From the *Work in Progress for Call, Ref No. : [call ref number]* screen,
2. Click on the *row* of the Service or Part you wish to Invoice.
3. Click on *Invoice WO*.

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

4. The Add new Customer Invoice screen will be displayed.

INVOICE CALL

1. From the *Work in Progress for Call, Ref No: [call ref number]* screen,
2. Click on the *row* of the Service or Part that you wish to invoice.
3. Click on *Invoice Call*.

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

4. "Invoice Header" on page 2

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