

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 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 > Calls

\$	Ŧ			BPO: \	/ersion 2.5.0.4 - Exam	ple Company	v2.5.0.0					_ D X
		Equipment / Locations	Contract Finance / HR	Inventory	/ Maintenance / Proj	cts Manuf	facturing	Procurement	Sales	Service	Reporting	Utilities
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		Technical	4		P	ocess		A	Ticke	ting	Open W	\Diamond

- 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*.



	Ŧ				1		Call Listing - BPO:	Version 2.5.0.8 - Exar	nple Company	v2.5.0.8			
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	D	urban	15		E CN0005304	15/03/2022	UnAssigned		10:30:03	Loan unit required while main unit is be		Repair	
	0	New 🖊	9		CN0005303	31/01/2022	UnAssigned		13:20:23	Drum replacement required	SERV	Service	FA
		In Progress	0		E CN0005301	18/01/2022	Awaiting Acceptance	Julanda Kessler	12:59:13	Replace part - current faulty	PR	Parts Requirement	FA
		Hold	3		CN0005301 CN0005300	18/01/2022		Julanda Kessler	12:59:15	Printer displaying error code	REP	Repair	EC
		Pending	1		 CN0005300 CN0005299 		Awaiting Acceptance	Julanda Kessler	12:51:45		ITS		P1
		Complete	2			18/01/2022	Awaiting Acceptance	Julanda Kessler		Paper keeps on jamming in machine	SM	IT-Support Call Scheduled Maintenance	PJ
		Closed	0			26/10/2021	Awaiting Acceptance		08:00:00	2MS - 2 month service			
	-	All	15	- 11 -		22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled Maintenance	
1	• 🖸 P	New	0	1.		16/10/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance	
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- 5. The *Call maintenance : Call ref [call reference number]* screen will display.
- 6. Click on the *Work In Progress* Tile.

Ŧ	5-	Ca	II maintenance :	Call ref C	N0005304 - BPO:	Version 2.5.0.	8 - Example Co	mpany v2.5	.0.8			
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	6 Address	Forest Hills	- <u>-</u>		Location							
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	ſ	-		-	Quote Referen							
Work In Progress	Call Type	Repair		•	Invoice Refere							
	Error Code			•	Order Referen	ice						
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	SLA				CallReference	CallDate	CallTime	Description	ı			CallType
			_		CN0005304	15/03/20	22 10:30:03	Loan unit r	equired while	e main unit is be	ing repaired	REP
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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 <u>not</u> been invoiced.

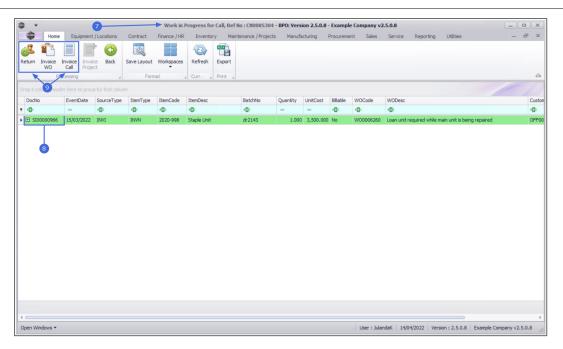
- 8. The *Doc No* column displays the, Work in Progress reference number for a *part* with a *SI* prefix to the number.
 - A service Work in Progress will display as SERVICE.

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*.



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

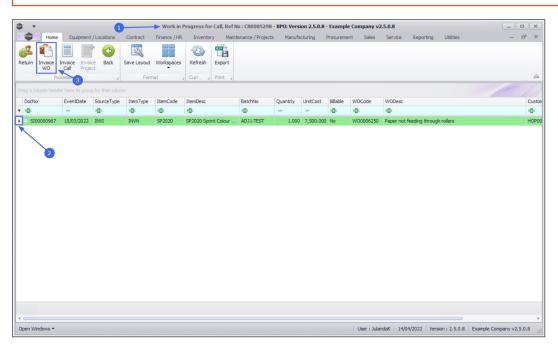
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INVOICE WORK ORDER

- 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.



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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*.



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4. "Invoice Header" on page 2

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