

We are currently updating our site; thank you for your patience.

# SERVICE

# INTRODUCTION TO WORK IN PROGRESS (WIP)

The Work in Progress (WIP) screen displays:

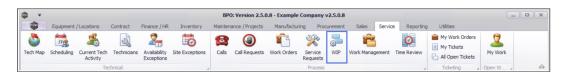
- Parts that have been issued or
- Third Party Services that have been received

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



1. The **Work in Progress for all work orders** listing screen will be displayed.



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Third Party Services that have been received.

f the items/services are **billable**, then it is an indication that they nave not vet been invoiced.

f the items are **non billable**, then it is an indication that the linked work order, call or project has <u>not</u> yet been closed.

### **WIP DATA GRID**

- 2. In the **Doc No** column,
- 3. a **part** WIP record is displayed as a **document number**, for example SI00001000
- 4. and a service WIP record is displayed as SERVICE.

Home	Equipment	/Locations	Contract	Finance / HR	Inventory Main	tenance / Project	s Manufa	cturing I	Procureme	ent Sales	Service Reporting Utilities - 5	2
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1 <b>0</b> 0	-	n 🗖 c	R C	n 🗖 c	* <b>0</b> ¢	n C	=	-	n C	10:	0:	
E SI0000684	01/08/2017	INVI	INVN	A4P	A4 Paper	20170731	1.000	0.000	Yes	WO0001493	Test edit call linked to asset - edit and save should keep WO	Def
SI0000676	14/07/2017		INVN	2020-147C	Cyan toner SP2020		1.000	450.000	Yes	WO0001528	Work Order Linked to an asset	
SI0000675	14/07/2017	-3	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	Yes	WO0000680	Work order with serial number	
SI0000665	07/07/2017	INVI	INVN	1616-147K	Black toner SP1616	20170707	1.000	350.000	No	WO0001523	Test creating a call with the required date field filled in.	
E SI0000664	06/07/2017	INVI	INVN	1020-147K	Toner Black		1.000	351.923	Yes	WO0001412	Test saving a call linked to a serial number to see if there is a	still
SERVICE	04/07/2017		CTRT	CALL	Call Out Fee		1.000	150.000	No	WO0001519	PRJ - Loan Units Processing	
SERVICE	04/07/2017	<b>4</b>	CTRT	DES	Design consultation		1.000	500.000	No	WO0001460	SP1912_NDS_2 - Network configuration	
SI0000658	30/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	No	WO0001513	Issued and invoiced stock	
SI0000643	20/06/2017	INVI	INVN	SP2020	SP2020 Sprint Colour		1.000	4,500.000	No	WO0001495	Test call for swap out - internal asset swap	
SI0000642	20/06/2017	INVI	INVN	SP 19 19	SP1919 Sprint Colour	cvb123	1.000	3,800.000	No	WO0001495	Test call for swap out - internal asset swap	
SI0000638	19/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	Yes	WO0001057	Call linked to BOM item	
SERVICE	15/06/2017	WOCT	CTRT	INST	Installation Fee		1.000	500.000	No	WO0001477	Test CrNote Totals for Pricing by TypeClass commercial	
SI0000632	09/06/2017	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0001459	SP1912_NDS_1 - Machine installation	
SI0000624	01/06/2017	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	450.000	No	WO0001439	Quick Part Return - Loan unit	
SI0000623	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-8594	1.000	5,000.000	No	WO0001439	Quick Part Return - Loan unit	
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-9058	1.000	5,000.000	Yes	WO0001438	Quick part return - invoiced	
SI0000626	01/06/2017	INVI	INVN	SP 18 18	Sprint copier	1818-6398	1.000			WO0001438	Quick part return - invoiced	
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-4585	1.000			WO0001438	Quick part return - invoiced	
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-0698	1.000			WO0001438	Quick part return - invoiced	
SI0000626	01/06/2017	INVI	INVN	SP1818	Sprint copier	1818-7659	1.000			WO0001438	Quick part return - invoiced	
\$100000676	01/06/2017	TNIVT	TMMM	CD 18 18	Sprint conier	1818-0671	1 000	5 000 000	Vec	WO0001438	Ouick part return - invoiced	

## **PROCESSING ACTION BUTTONS**

From this screen, you can:

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- Return an item or service using the <u>**Return**</u> button.
- Invoice a work order using the **Invoice WO** button.
- Invoice a call using the **Invoice Call** button.
- Invoice a project using the Invoice Project button.

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E S	WO	2	Call	Projec	t Paper	20170731	1.000	0.000	-	WO0001493	Test edit call linked to asset - edit and save should keep WO
S10000070		TIAAT	TIAAIA	-	cyan toner SP2020		1.000	450.000		WO0001528	Work Order Linked to an asset
SI0000675	14/07/2017	INVI	INVN		Cyan toner SP2020		1.000	450.000	Yes	WO0000680	Work order with serial number
SI0000665	07/07/2017	INVI	INVN	1616-147K	Black toner SP1616	20170707	1.000	350.000	No	WO0001523	Test creating a call with the required date field filled in.
E SI0000664	06/07/2017	INVI	INVN	1020-147K	Toner Black		1.000	351.923	Yes	WO0001412	Test saving a call linked to a serial number to see if there is
SERVICE	04/07/2017	WOCT	CTRT	CALL	Call Out Fee		1.000	150.000	No	WO0001519	PRJ - Loan Units Processing
SERVICE	04/07/2017	WOCT	CTRT	DES	Design consultation		1.000	500.000	No	WO0001460	SP1912_NDS_2 - Network configuration
SI0000658	30/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	No	WO0001513	Issued and invoiced stock
SI0000643	20/06/2017	INVI	INVN	SP2020	SP2020 Sprint Colour		1.000	4,500.000	No	WO0001495	Test call for swap out - internal asset swap
SI0000642	20/06/2017	INVI	INVN	SP1919	SP1919 Sprint Colour	cvb123	1.000	3,800.000	No	WO0001495	Test call for swap out - internal asset swap
SI0000638	19/06/2017	INVI	INVN	204-147C	SP204 Cyan Toner		1.000	350.000	Yes	WO0001057	Call linked to BOM item
SERVICE	15/06/2017	WOCT	CTRT	INST	Installation Fee		1.000	500.000	No	WO0001477	Test CrNote Totals for Pricing by TypeClass commercial
		INVI	INVN		SP 19-12 Black Toner		1.000	361.765		WO0001459	SP1912_NDS_1 - Machine installation
		INVI	INVN		Cyan toner SP2020		1.000	450.000		WO0001439	Quick Part Return - Loan unit
		INVI	INVN		Sprint copier	1818-8594	1.000	5,000.000		WO0001439	Quick Part Return - Loan unit
SI0000626		INVI	INVN		Sprint copier	1818-9058	1.000	5,000.000		WO0001438	Quick part return - invoiced
SI0000626		INVI	INVN		Sprint copier	1818-6398	1.000	5,000.000		WO0001438	Quick part return - invoiced
		INVI	INVN		Sprint copier	1818-4585	1.000	5,000.000		WO0001438	Quick part return - invoiced
		INVI	INVN		Sprint copier	1818-0698	1.000	5,000.000		WO0001438	Quick part return - invoiced
		INVI	INVN		Sprint copier	1818-7659	1.000	5,000.000		WO0001438	Quick part return - invoiced
aca0000012	01/06/2017	TNIVT	TNIMN	CD 19 19	Sprint conier	1818-0671	1 000	5 000 000	Yer	w/00001439	Ouide part return - invoiced

#### **EXPORT**

- 1. You can choose to export a list of **all** the Work in Progress records,
- 2. or a **selected list**, by refining the list by filtering the data grid using the filter row.
- 3. Click on **Export**.



#### Introduction to Work in Progress (WIP)

	_			Work	n Progress for all wor	k orders - BPO:	Version 2.5.0	.8 - Examp	le Compa	any v2.5.0.8				Ŀ		
Home	Equipment	/Locations	Contract	Finance / HR	Inventory Mai	ntenance / Project	s Manufa	cturing I	Procureme	nt Sales	Service	Reporting	Utilities		- 8	2
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		sourcerype	RE: CT	REC	n C	REC.	Quartury	=	REC	NOCOUE	R					
SERVICE	19/11/2015	· · · · · · · · · · · · · · · · · · ·	CTRT	INST	Installation Fee	- <b>-</b>	2.000	500.000		WO0000662	-	ntract Detail re	and in place.	there are the large	on stady	
SERVICE     SERVICE	18/11/2015	WOCT	CTRT	DEL	Delivery Fee		2.000	800.000		WO0000653		stock grns - par		arter partiarn	JIT SLOCK	rei
SERVICE	18/11/2015	WOCT	CTRT	DEL	Delivery Fee		1.000	500.000		WO0000653		stock grns - par				
SERVICE	18/11/2015	WOCT	CTRT	TOLL	Toll Fee		3.000	1,500.000		WO0000655		partial supplier		test		
SERVICE	18/11/2015	WOCT	CTRT	TOLL	Toll Fee		1.000	1.000.000		WO0000655		partial supplier				
SERVICE	18/11/2015	WOCT	CTRT	TOLL	Toll Fee		3.000	500.000		WO0000655		partial supplier				
SERVICE	18/11/2015	WOCT	CTRT	INST	Installation Fee		1.000	500.000		WO0000662		ntract Detail re			on stock	re
SERVICE	18/11/2015	WOCT	CTRT	CALL	Call Out Fee		3.000	1.000.000	No	WO0000657		al non stock pro				
SERVICE	18/11/2015	WOCT	CTRT	CALL	Call Out Fee		2.000	650.000	No	WO0000657	Test parti	al non stock pro	curement - e	dit costs		
SERVICE	17/11/2015	WOCT	CTRT	TOLL	Toll Fee		1.000	125.000	No	WO0000650	test multi	line subcontrac	t same ctrt pa	artial grn		
SERVICE	05/11/2015	WOCT	CTRT	INST	Installation Fee		2.000	500.000	Yes	WO0000616	SP240-3 -	Documentation	1			
SERVICE	05/11/2015	WOCT	CTRT	DEL	Delivery Fee		1.000	250.000	Yes	WO0000614	SP240-1 -	Machine Instal	ation			
SERVICE	26/02/2015	WOCT	CTRT	INST	Installation Fee		1.000	1,250.000	No	WO0000459	Set up ner	w email address	es			
SERVICE	23/09/2014	WOCT	CTRT	CALL	Call Out Fee		1.000	750.000	Yes	WO0000242	Toner for	delivery to dier	nt			
SERVICE	21/07/2014	WOCT	CTRT	DEA	Dealer Service Fee		1.000	950.000	Yes	WO0000185	Machine r	epair needed				
SERVICE	21/07/2014	WOCT	CTRT	DEA	Dealer Service Fee		1.000	950.000	Yes	WO0000183	Service m	achine S/N: 19	12-102036			
SERVICE	21/07/2014	WOCT	CTRT	TRA	Employee Training		1.000	850.000	Yes	WO0000182	Machine e	rror code - ser	vice - 1250			
SERVICE	04/07/2014	WOCT	CTRT	DEL	Delivery Fee		1.000	250.000	No	WO0000173	SP1912_N	IDS_1 - Machine	installation			
Contains([]	(temType], 'CT')														Edi	it F

- 4. The list of Work in Progress records will display be exported to an **Excel spreadsheet**.
- 5. Make the necessary **changes** to the spreadsheet, **save** and **print** from Excel, as required.
- 6. **Close** the screen to return to the Work In Progress for all work orders screen.

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2 SERVICE	07/05/2020	WOCT	CTRT	TRA	Employee Training	3		1.000	650.000	Yes	WO0000135	SP19-12IR - SP19-12 Inhouse Renta	al
3 SERVICE	03/09/2018	WOCT	CTRT	CALL	Call Out Fee			1.000	150.000	Yes	WO0002210	SP1912_NDS_2 - Network configur	ratio
4 SERVICE	11/07/2018	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0002241	Auto Invoicing Next Level	
5 SERVICE	30/05/2018	WOCT	CTRT	CALL	Call Out Fee			1.000	150.000	No	WO0002196	Create a call to test the meter read	ding
6 SERVICE	29/05/2018	WOCT	CTRT	INST	Installation Fee			1.000	1,250.000	Yes	WO0002202	1234	
7 SERVICE	16/04/2018	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0001634	Test call list refreshing after saving	a ne
8 SERVICE	28/11/2017	WOCT	CTRT	DES	Design consultatio	on		1.000	500.000	No	WO0001615	Created for production batch - test	t
9 SERVICE	20/11/2017	WOCT	CTRT	INST	Installation Fee			1.000	1,250.000	Yes	WO0000114	WS - Weekly Service	
10 SERVICE	17/11/2017	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0001608	test creating a call without a work	orde
1 SERVICE	07/11/2017	WOCT	CTRT	CLA	Cleaning Fee			1.000	500.250	Yes	WO0001136	Created for production batch -	
2 SERVICE	04/07/2017	WOCT	CTRT	CALL	Call Out Fee			1.000	150.000	No	WO0001519	PRJ - Loan Units Processing	
13 SERVICE	04/07/2017	WOCT	CTRT	DES	Design consultatio	on		1.000	500.000	No	WO0001460	SP1912_NDS_2 - Network configur	atio
14 SERVICE	15/06/2017	WOCT	CTRT	INST	Installation Fee			1.000	500.000	No	WO0001477	Test CrNote Totals for Pricing by T	ype(
15 SERVICE	26/05/2017	WOCT	CTRT	DEA	Dealer Service Fee			1.000	450.000	Yes	WO0001406	v2.1.0.6 Project Invoices	_
16 SERVICE	25/05/2017	WOCT	CTRT	INSP	Inspection			1.000	800.000	Yes	WO0001404	Invoice test v2.1.0.6 - Faulty - mac	hine
17 SERVICE	24/05/2017	WOCT	CTRT	DEL	Delivery Fee			1.000	800.000	Yes	WO0001382	Procurement- Third Party Service	_
18 SERVICE	24/05/2017	WOCT	CTRT	DEL	Delivery Fee			1.000	800.000			Contract - Call Closure - PR Release	e
19 SERVICE	24/05/2017	WOCT	CTRT	DEL	Delivery Fee			1.000	800.000	Yes	WO0001377	Third Party Service v2.1.0.5	
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