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

PROJECTS

PROJECTS - WORK IN PROGRESS

The Work in Progress (WIP) screen displays:

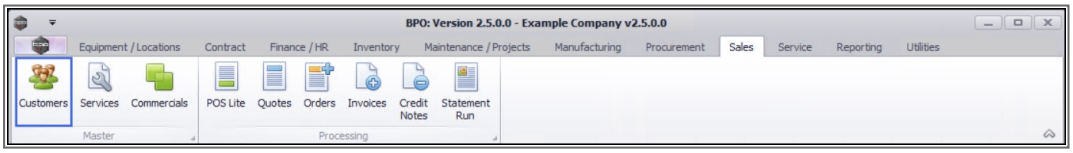
- **Parts** that have been issued or
- **Third Party Services** that have been received

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: Maintenance / Projects > Projects



1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project can be located.
    - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Click on the **row** of the project you wish to view the Work in Progress for.
5. Click on the **Work In Progress** tile.

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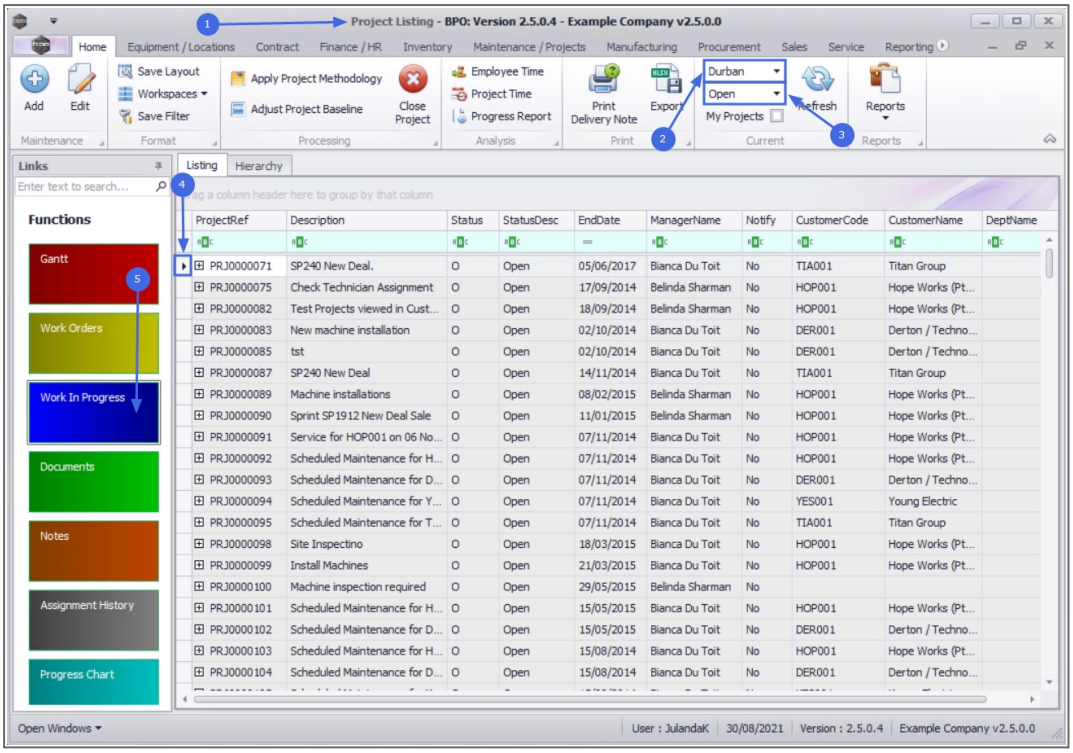

6. The **Work in Progress for Project, Ref No : [**project ref number**]** listing screen will be displayed.
    - The screen displays both stock or internal assets that have been issued, as well as Third Party Services that have been received
    - If the items / services are billable - they have not been invoiced.
    - If the items are non-billable, the linked work order, call or project has not yet been closed.
7. 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

8. From this screen, you can:

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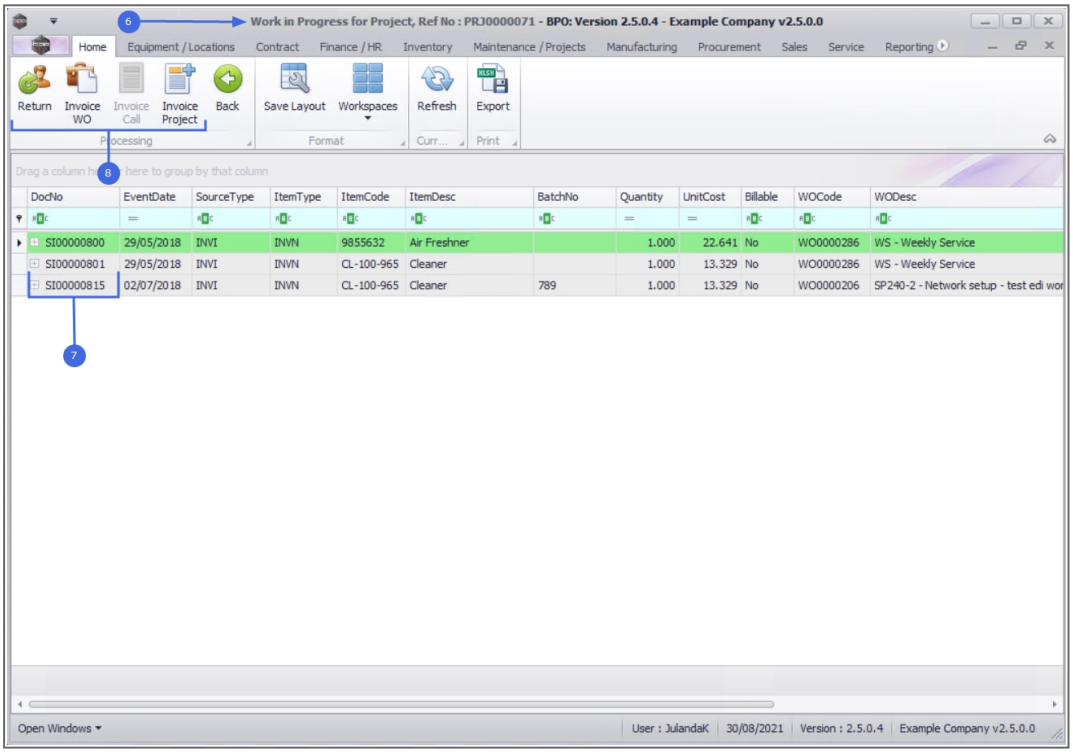
- Do a Return Request for an item or service,
- Invoice a work order, or
- Invoice a project.

> The **Invoice Call** button has been **greyed** out indicating that a Call cannot be Invoiced from this screen.



RETURN REQUEST

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

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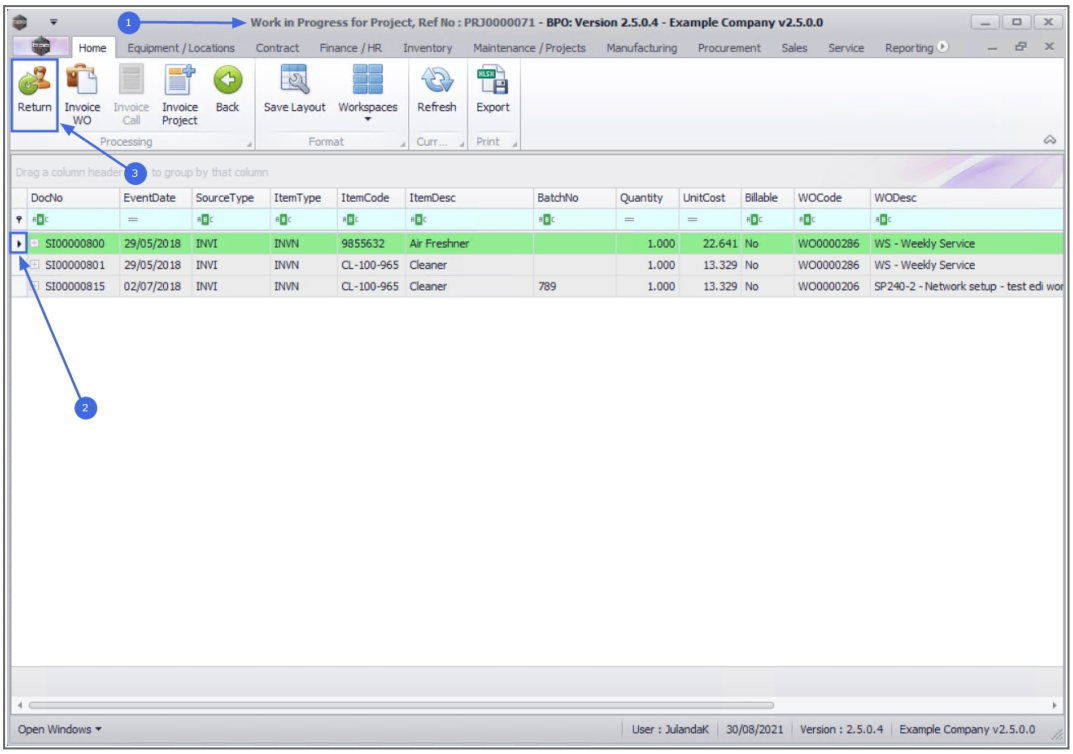
Short cut key: Right click to display the **Process** menu list. Click on **Return**.



4. "The Add new Return Request screen will be displayed. " on page 2
5. After completing all the required information, click on **Save**.

For a detailed handling of this topic refer to Work in Progress - Returns

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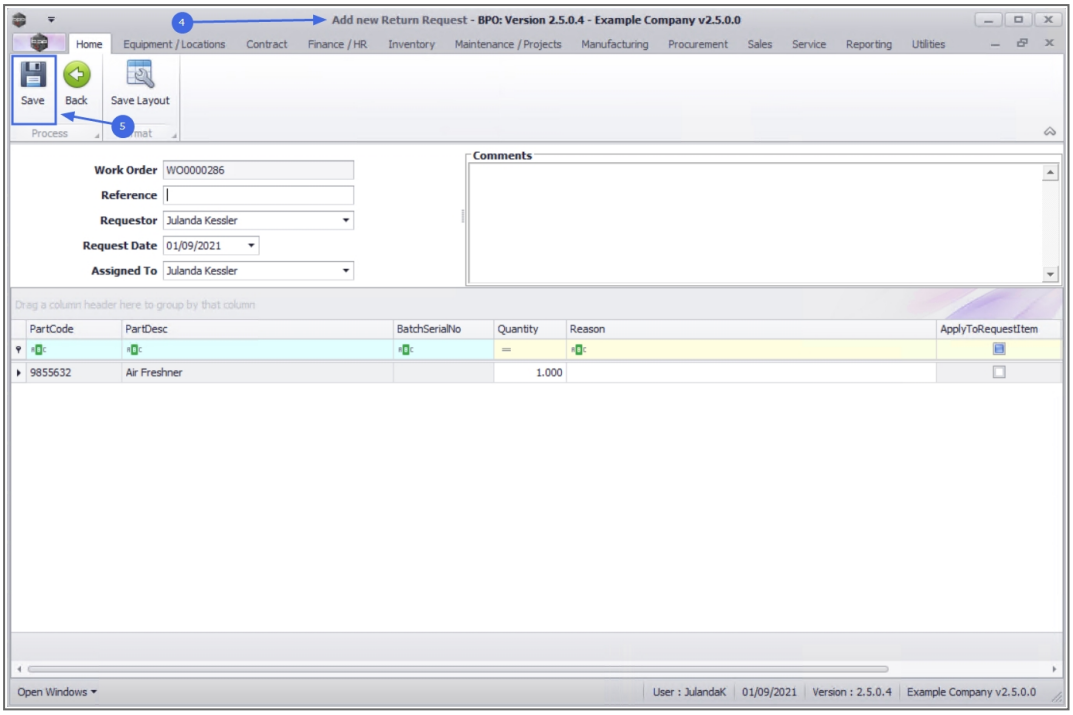

INVOICE WORK ORDER

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

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

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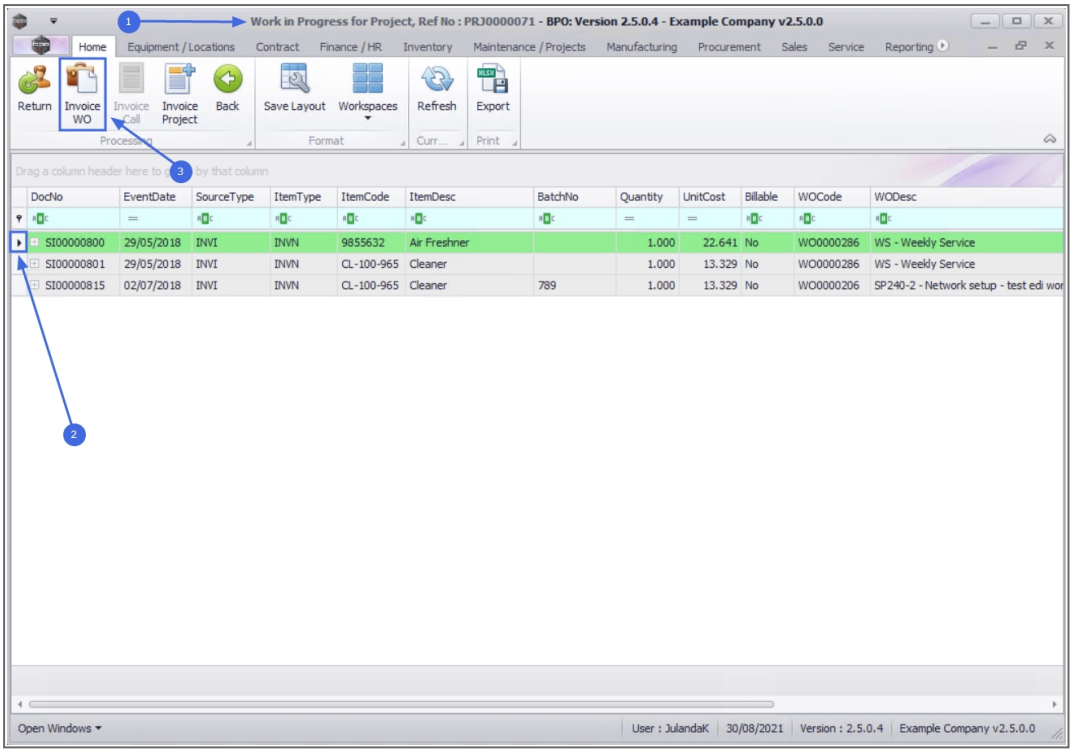

4. " The Add new Customer Invoice screen will display." on page 2
5. After completing all the required information, click on **Save**.

For a detailed handling of this topic refer to Work in Progress - Invoice Work Orders

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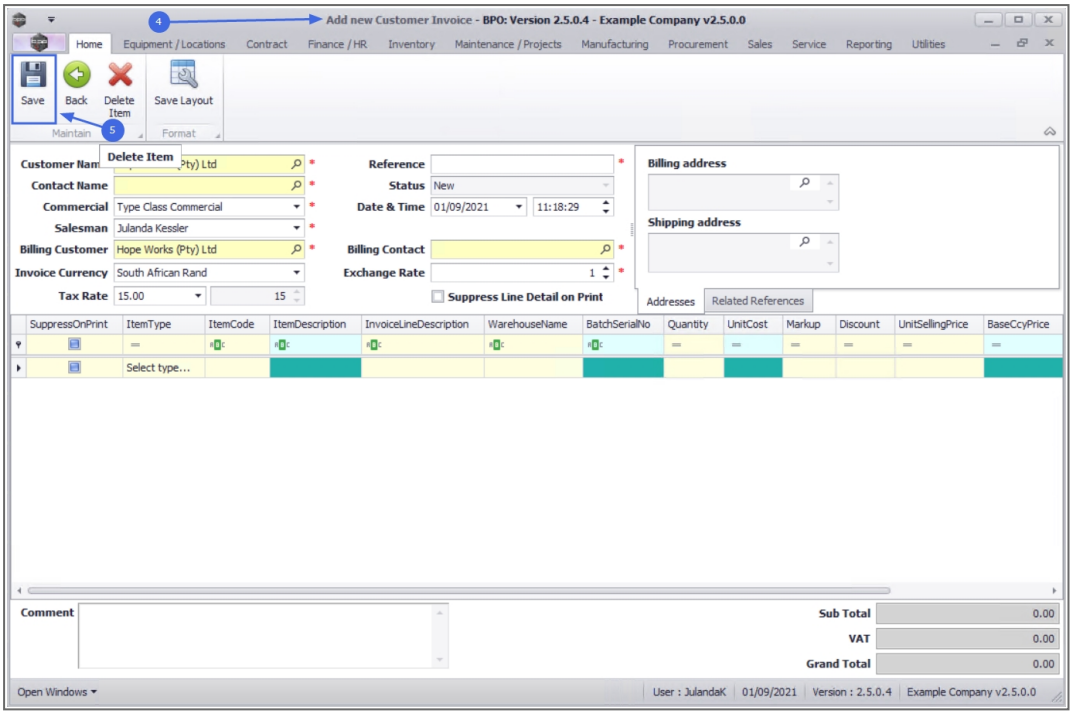

INVOICE PROJECT

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

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

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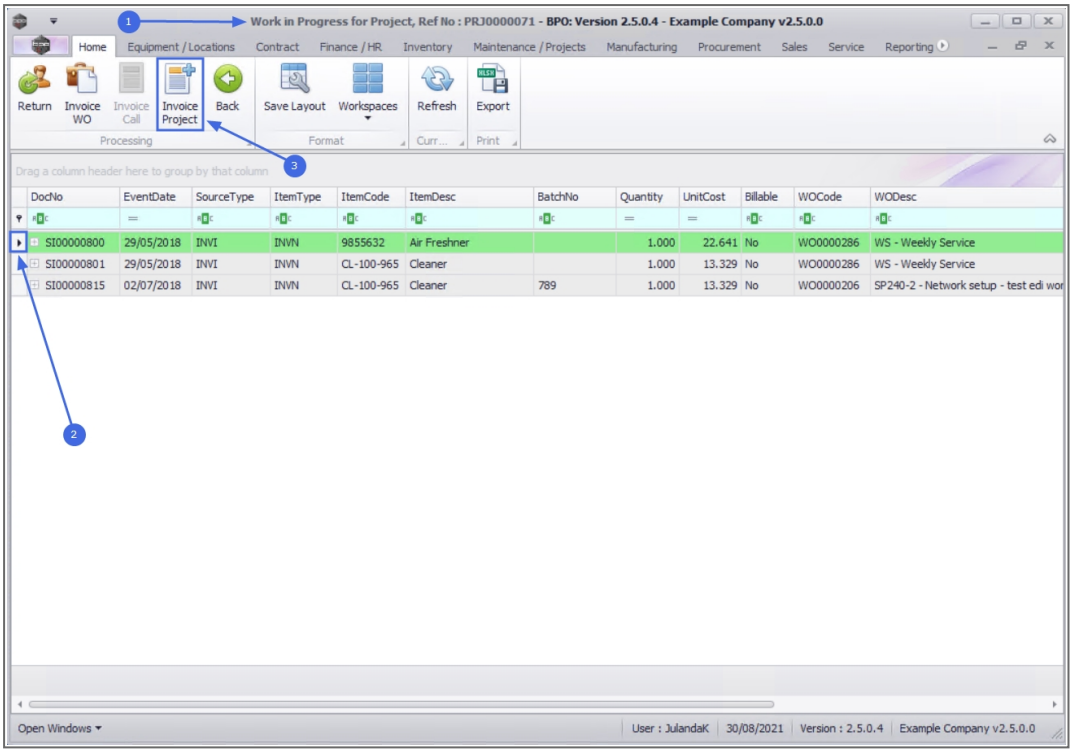

4. " The Add new Customer Invoice screen will display." on page 2
5. After completing all the required information, click on **Save**.

For a detailed handling of this topic refer to Work in Progress - Invoice Project

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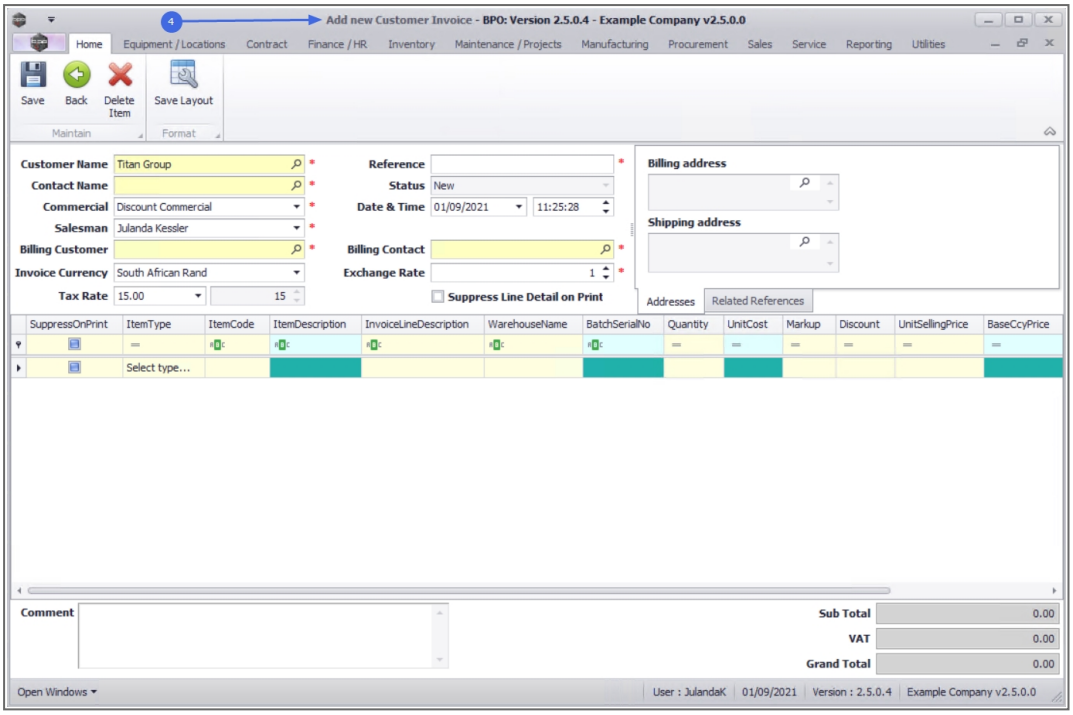

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