

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 <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: Maintenance / Projects > Projects

⊉ =				BPO:	Version 2.5.0.0 - Exa	mple Company v	2.5.0.0					_ – ×
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	Master		Proce	essing	4							\diamond

- 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.



Projects - Work in Progress (WIP)

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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 <u>not</u> been invoiced.
 - If the items are non-billable, the linked work order, call or project has not yet been closed.
- 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:



V Do a Return Request for an item or service,



V Invoice a project.

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

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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.



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
- 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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