

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

SERVICE

WORK IN PROGRESS – INVOICE WORK ORDERS

The Work in Progress (WIP) screen displays:

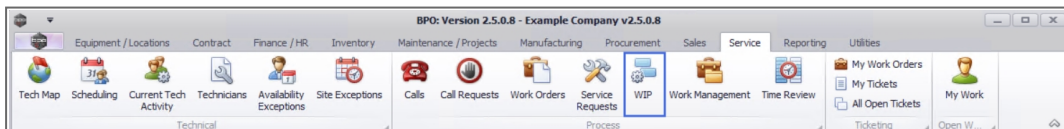
- **Parts** that have been issued or
- **Third Party Services** that have been received

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 Assets** 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.

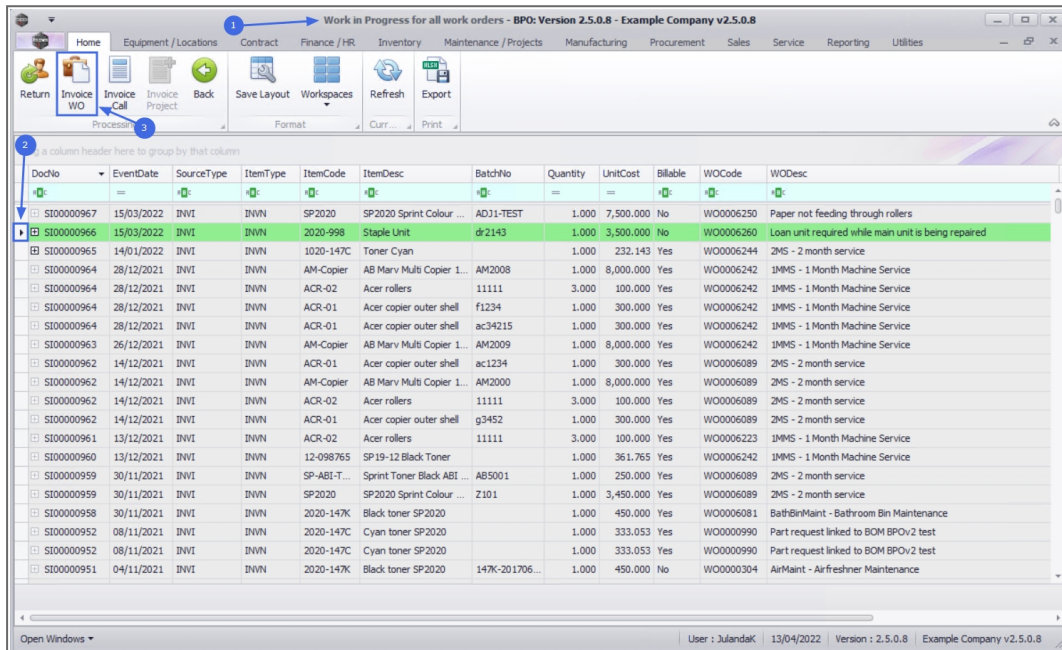
A work order can be linked to a;

- Call,
- Project, or

- Be a standalone work order.

Any of these work orders can be invoiced from this screen.

2. Click on the **row** of the item or service you wish to invoice.
3. Click on **Invoice WO**.



4. The Add new Customer Invoice screen will display.
5. Complete the **Customer Invoice Header** and the **Financial Header** information.
6. Confirm the **Billing and Shipping Addresses**, if these have not populated when you entered the Header information.

Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout

Maintain | Format

Customer Name: Office Supplies Unlimited | Reference: HW250 | Billing address: PO Box 9632 Forest Hills

Contact Name: Samantha Times | Status: New | Date & Time: 13/04/2022 13:49:29 | Shipping address: 674 Nightwish Ave Forest Hills 1234

Commercial: Type Class Commercial | Salesman: Julanda Kessler | Billing Customer: Office Supplies Unlimited | Billing Contact: Samantha Times | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 15.00 | Suppress Line Detail on Print:

| SuppressOnPrint | ItemType | ItemCode | ItemDescription | InvoiceLineDescription | WarehouseName | BatchSerialNo | Quantity | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice | TaxRate | Depa |
|--------------------------|----------------|----------|---------------------|----------------------------|---------------|---------------|----------|----------|--------|----------|------------------|--------------|---------|------|
| <input type="checkbox"/> | Labour | DRV | Driver | Driver | | | 3.000 | 350.000 | 15.000 | 0.000 | 172.500 | 172.500 | 15.000 | |
| <input type="checkbox"/> | Expenses | ON | Over night stay ... | Over night stay as inst... | | | 1.000 | 750.000 | 15.000 | 0.000 | 862.500 | 862.500 | 15.000 | |
| <input type="checkbox"/> | Warranty | 12MSW | 12 Month Suppli... | 12 Month Suppl... War... | | | 1.000 | 0.000 | 15.000 | 0.000 | 0.000 | 0.000 | 15.000 | |
| <input type="checkbox"/> | Select type... | | | | | | | | | | | | | |

Comment:

Sub Total: 1,380.00
VAT: 207.00
Grand Total: 1,587.00

Open Windows | User: JulandaK | 13/04/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

7. Click on the **Related References** tab to view the related references linked to this invoice.

Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout

Maintain | Format

Customer Name: Office Supplies Unlimited | Reference: | Billing address: PO Box 9632 Forest Hills

Contact Name: Samantha Times | Status: New | Date & Time: 14/04/2022 09:31:33 | Shipping address: 674 Nightwish Ave Forest Hills 1234

Commercial: Type Class Commercial | Salesman: Julanda Kessler | Billing Customer: Office Supplies Unlimited | Billing Contact: Samantha Times | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 15.00 | Suppress Line Detail on Print:

| SuppressOnPrint | ItemType | ItemCode | ItemDescription | InvoiceLineDescription | WarehouseName | BatchSerialNo | Quantity | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice | TaxRate | Department |
|--------------------------|----------------|----------|---------------------|----------------------------|---------------|---------------|----------|----------|--------|----------|------------------|--------------|---------|------------|
| <input type="checkbox"/> | Labour | DRV | Driver | Driver | | | 3.000 | 350.000 | 15.000 | 0.000 | 172.500 | 172.500 | 15.000 | |
| <input type="checkbox"/> | Expenses | ON | Over night stay ... | Over night stay as inst... | | | 1.000 | 750.000 | 15.000 | 0.000 | 862.500 | 862.500 | 15.000 | |
| <input type="checkbox"/> | Warranty | 12MSW | 12 Month Suppli... | 12 Month Suppl... War... | | | 1.000 | 0.000 | 15.000 | 0.000 | 0.000 | 0.000 | 15.000 | |
| <input type="checkbox"/> | Select type... | | | | | | | | | | | | | |

Comment:

Sub Total: 1,380.00
VAT: 207.00
Grand Total: 1,587.00

Open Windows | User: JulandaK | 14/04/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

8. The invoice items to be billed will not only be limited to parts and services but will include **all** billable items linked to the work order.

9. Click in the **Comments** text box to type in a comment related to the invoice.
10. When you have finished editing the details on this screen, click on **Save**.



For a detailed handling of this topic refer to [Invoices - Create Sales Invoice \(OTC\)](#)

11. You will return to the **Work in Progress** for all work orders screen.



To view the invoice and further invoice processing, refer to [Introduction to Sales Invoices](#).



Work in Progress - Invoice Work Orders

Work in Progress for all work orders - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Return Invoice W/O Invoice Call Invoice Project Back Save Layout Workspaces Refresh Export

Processing Format Curr... Print

Drag a column header here to group by that column

| DocNo | EventDa... | SourceType | ItemType | ItemCode | ItemDesc | BatchNo | Quantity | UnitCost | Billable | WCode | WODesc | Custom |
|------------|------------|------------|----------|-------------|----------------------------|----------------|----------|-----------|----------|-----------|--|--------|
| SI00000966 | 15/03/2022 | INVI | INVN | 2020-998 | Staple Unit | d2143 | 1.000 | 3,500.000 | No | W00006260 | Loan unit required while main unit is being repaired | OF |
| SI00000967 | 15/03/2022 | INVI | INVN | SP2020 | SP2020 Sprint Colour ... | ADJ1-TEST | 1.000 | 7,500.000 | No | W00006250 | Paper not feeding through rollers | HO |
| SI00000965 | 14/01/2022 | INVI | INVN | 1020-147C | Toner Cyan | | 1.000 | 232.143 | Yes | W00006244 | ZMS - 2 month service | GRI |
| SI00000964 | 28/12/2021 | INVI | INVN | AM-Copier | AB Marv Multi Copier 1... | AM2008 | 1.000 | 8,000.000 | Yes | W00006242 | IMMS - 1 Month Machine Service | BEI |
| SI00000964 | 28/12/2021 | INVI | INVN | ACR-02 | Acer rollers | 11111 | 3.000 | 100.000 | Yes | W00006242 | IMMS - 1 Month Machine Service | BEI |
| SI00000964 | 28/12/2021 | INVI | INVN | ACR-01 | Acer copier outer shell | f1234 | 1.000 | 300.000 | Yes | W00006242 | IMMS - 1 Month Machine Service | BEI |
| SI00000964 | 28/12/2021 | INVI | INVN | ACR-01 | Acer copier outer shell | ac34215 | 1.000 | 300.000 | Yes | W00006242 | IMMS - 1 Month Machine Service | BEI |
| SI00000963 | 26/12/2021 | INVI | INVN | AM-Copier | AB Marv Multi Copier 1... | AM2009 | 1.000 | 8,000.000 | Yes | W00006242 | IMMS - 1 Month Machine Service | BEI |
| SI00000962 | 14/12/2021 | INVI | INVN | ACR-01 | Acer copier outer shell | ac1234 | 1.000 | 300.000 | Yes | W00006089 | ZMS - 2 month service | HO |
| SI00000962 | 14/12/2021 | INVI | INVN | AM-Copier | AB Marv Multi Copier 1... | AM2000 | 1.000 | 8,000.000 | Yes | W00006089 | ZMS - 2 month service | HO |
| SI00000962 | 14/12/2021 | INVI | INVN | ACR-02 | Acer rollers | 11111 | 3.000 | 100.000 | Yes | W00006089 | ZMS - 2 month service | HO |
| SI00000962 | 14/12/2021 | INVI | INVN | ACR-01 | Acer copier outer shell | g3452 | 1.000 | 300.000 | Yes | W00006089 | ZMS - 2 month service | HO |
| SI00000961 | 13/12/2021 | INVI | INVN | ACR-02 | Acer rollers | 11111 | 3.000 | 100.000 | Yes | W00006223 | IMMS - 1 Month Machine Service | BEI |
| SI00000960 | 13/12/2021 | INVI | INVN | 12-098765 | SP19-12 Black Toner | | 1.000 | 361.765 | Yes | W00006242 | IMMS - 1 Month Machine Service | BEI |
| SI00000959 | 30/11/2021 | INVI | INVN | SP-ABI-T... | Sprint Toner Black ABI ... | AB5001 | 1.000 | 250.000 | Yes | W00006089 | ZMS - 2 month service | HO |
| SI00000959 | 30/11/2021 | INVI | INVN | SP2020 | SP2020 Sprint Colour ... | Z101 | 1.000 | 3,450.000 | Yes | W00006089 | ZMS - 2 month service | HO |
| SI00000958 | 30/11/2021 | INVI | INVN | 2020-147K | Black toner SP2020 | | 1.000 | 450.000 | Yes | W00006081 | BathBinMaint - Bathroom Bin Maintenance | WE |
| SI00000952 | 08/11/2021 | INVI | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 333.053 | Yes | W00000990 | Part request linked to BOM BPOv2 test | HO |
| SI00000952 | 08/11/2021 | INVI | INVN | 2020-147C | Cyan toner SP2020 | | 1.000 | 333.053 | Yes | W00000990 | Part request linked to BOM BPOv2 test | HO |
| SI00000951 | 04/11/2021 | INVI | INVN | 2020-147K | Black toner SP2020 | 147K-201706... | 1.000 | 450.000 | No | W00000304 | AirMaint - Airfreshner Maintenance | |

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