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

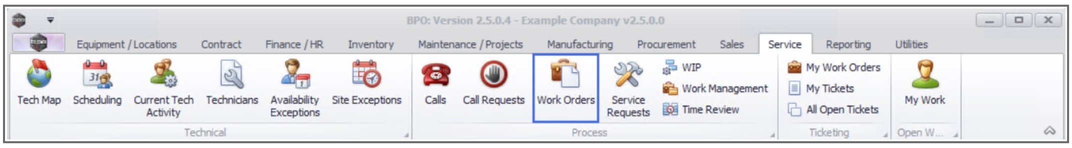
SERVICE

WORK ORDERS – EXPENSES

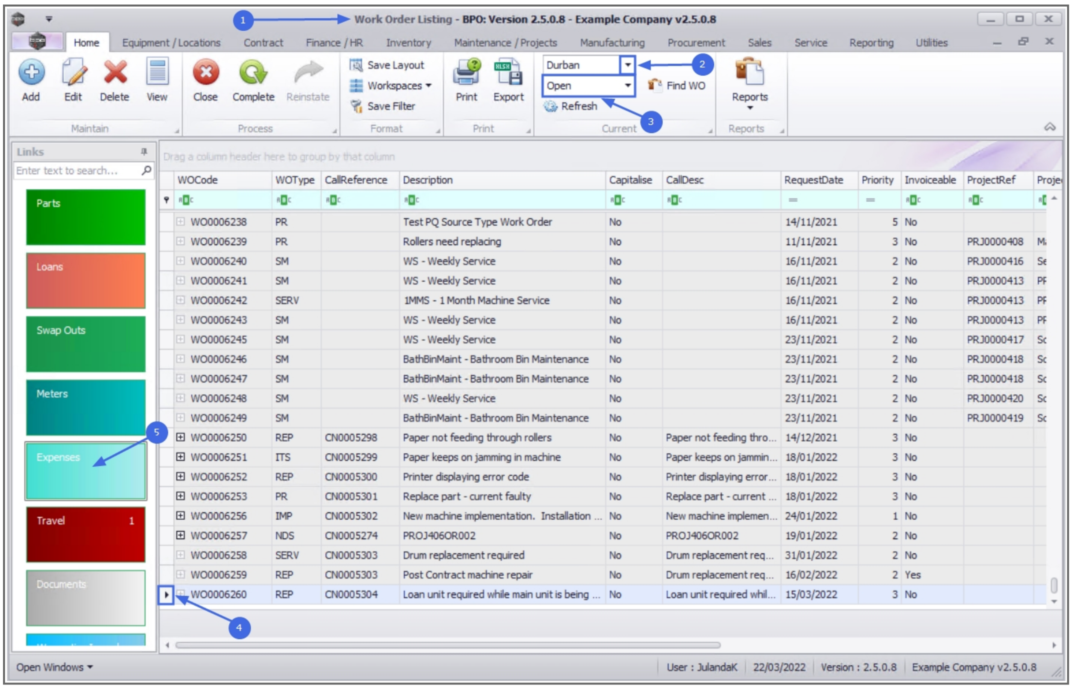
Confirm with your supervisor as to whether you will log your expenses, or whether the call centre administration will do this.

Expenses will be updated automatically for clients using Tech Connect.

Ribbon Access: Service > Work Orders



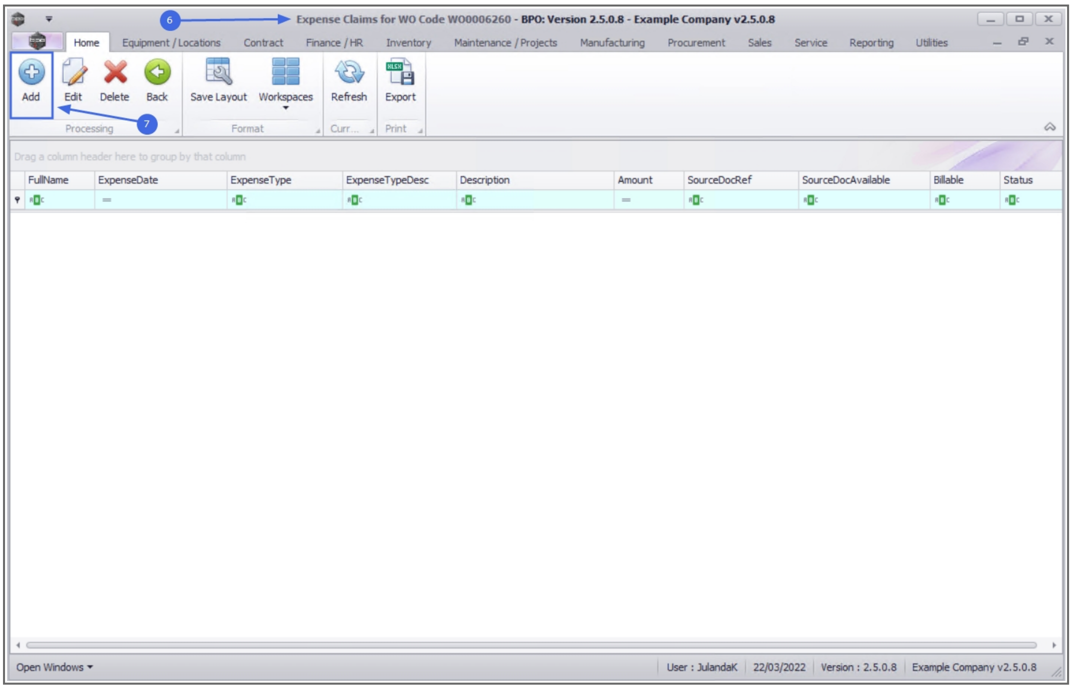
1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** where the work order was assigned.
   - The example has **Durban** selected.
3. Set the **Status** to **Open**.
4. Click on the **row** of the **work order** you wish to **add** an expense claim to.
5. Click on the **Expenses** tile.



6. The **Expense Claims for WO Code [**work order code**]** screen will be displayed.

ADD EXPENSE CLAIM

7. Click on **Add**.



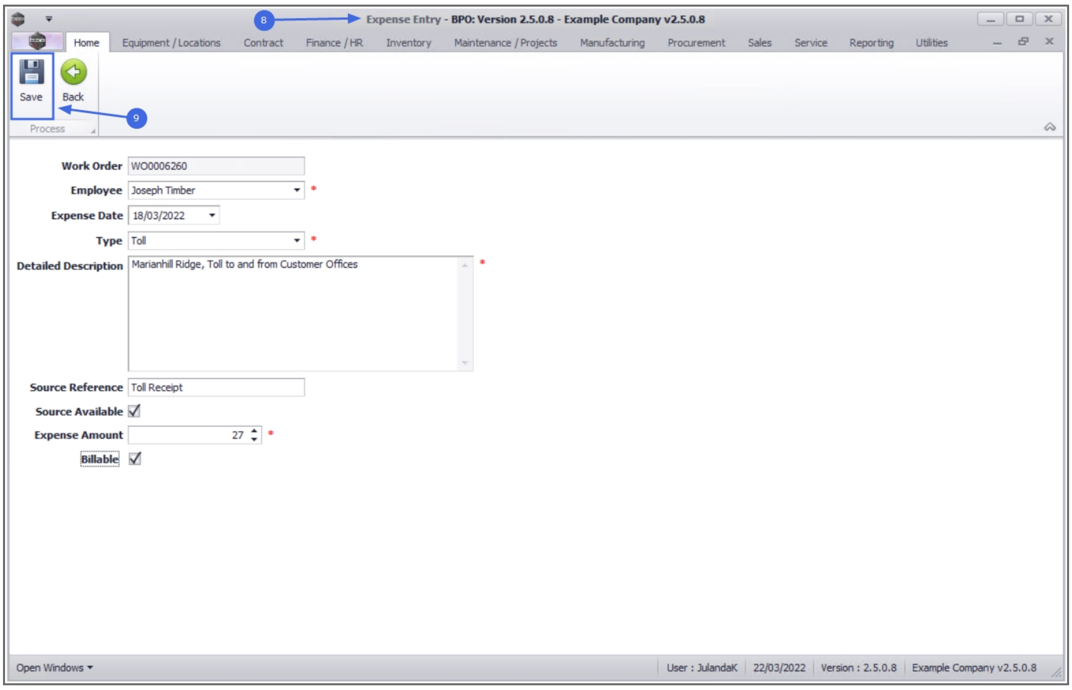
8. The **Expense Entry** screen will be displayed.
   - **Work Order:** The work order number selected will auto populate the field.
   - **Employee:** The employee logging the expense entry will display in this field. Click on the **search** button to select the employee who incurred the expense.
   - **Expense Date:** The current date will display. Click on the down **arrow** to select the date the expense was incurred, using the calendar function.
   - **Type:** Click on the down **arrow** to select the Expense type.

     Refer to Basic Static Data to add or edit an expense type.

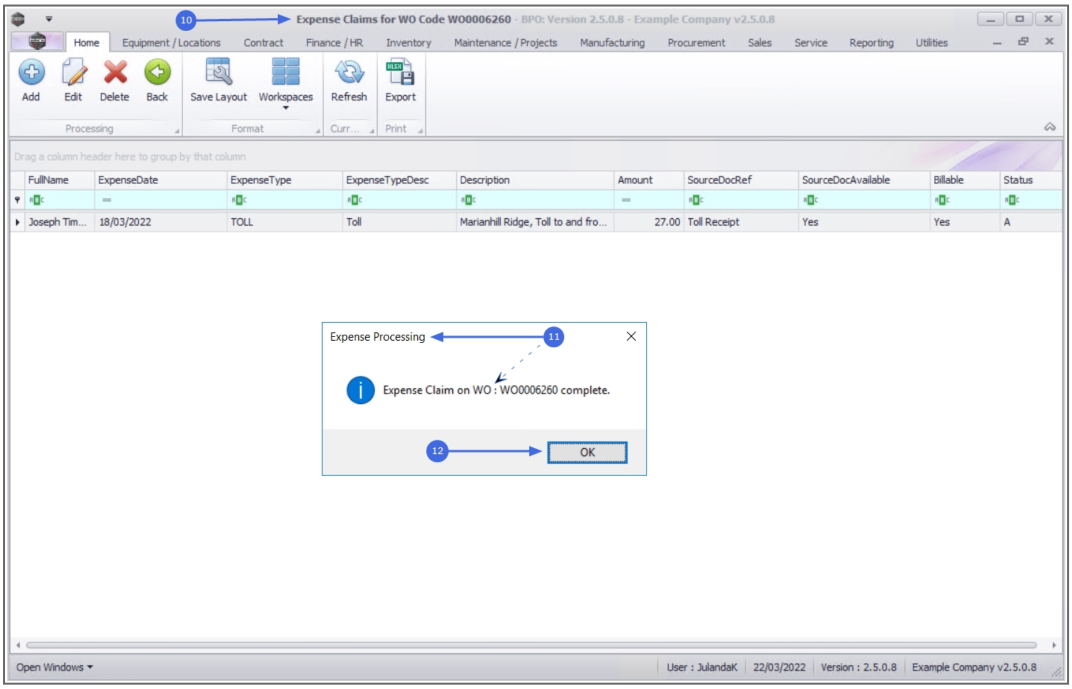
   - **Detailed Description:** Type in the description or reason for the expenses.
   - **Source Reference:** Type in the reference or proof for the expense, e.g. receipt information, if available.

- **Source Available:** Click to select the **check box**, if documentation, e.g receipt, for the expense, if available.
- **Expense Amount:** Click to type in or use the arrow indicators to select the rand value for the expense.
- **Billable:** Click to select the check box if the expense is billable. Leave unselected, if the expense is not billable.

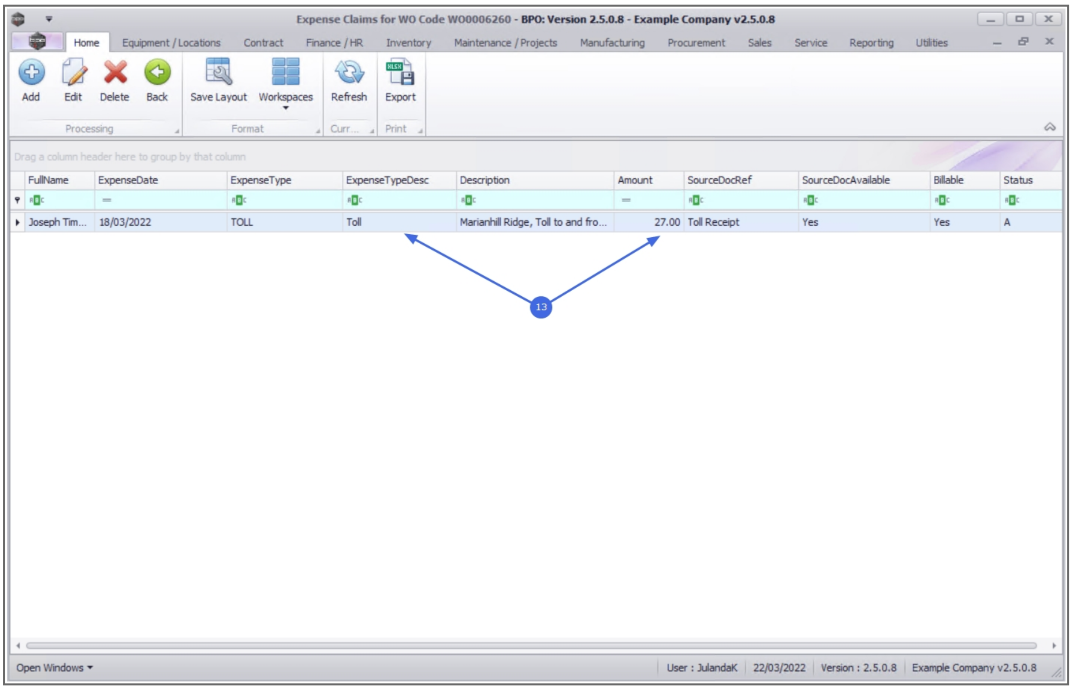
9. When you have finished adding the expense claim details, click on **Save**.



10. You will return to the **Expense Claims for WO Code** screen.
11. When you receive the **Expense Processing** message to confirm that;
    - **Expense Claim on WO: [**work order code**] complete.**
12. Click on **OK**.

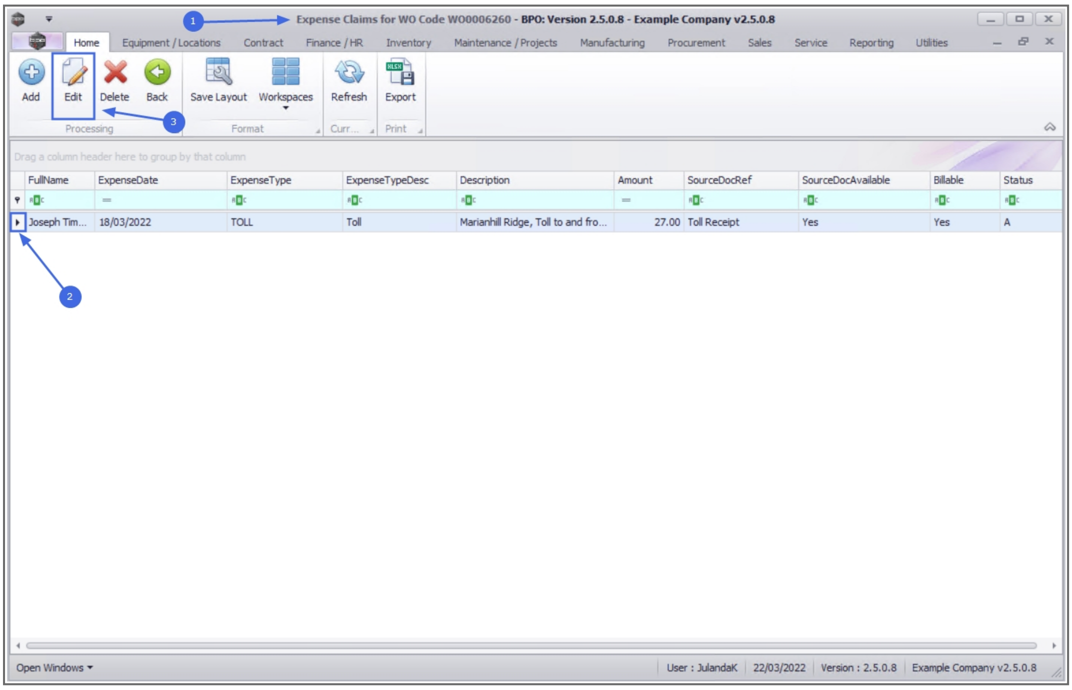


13. The Expense Claim can be viewed in the **Expense Claims for WO Code** screen.

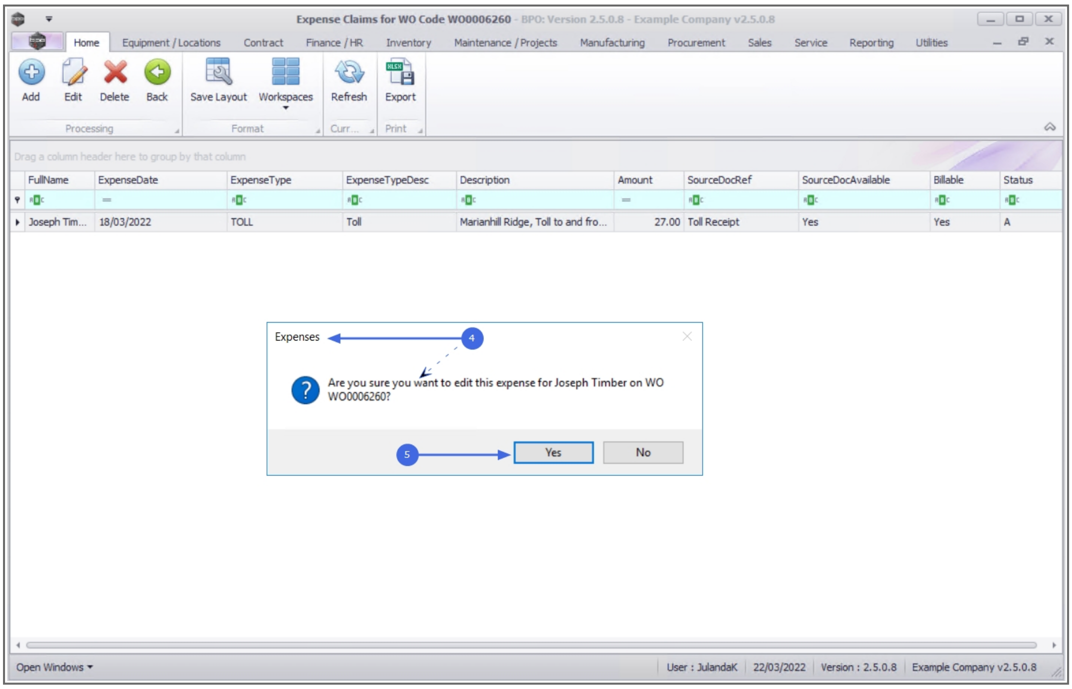


EDIT EXPENSE CLAIM

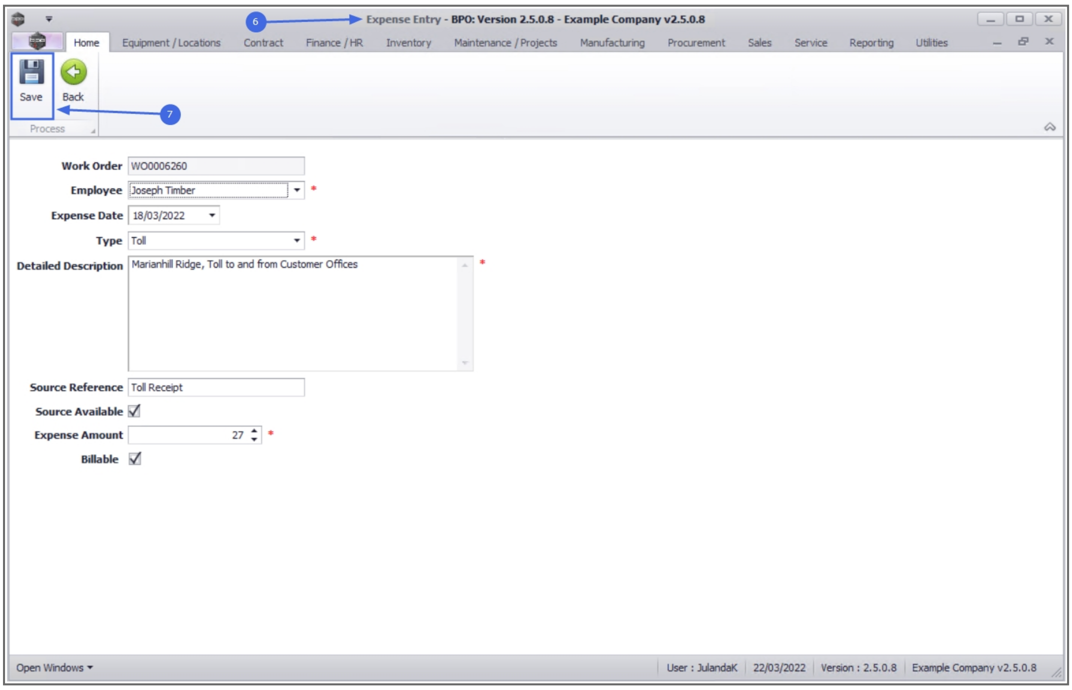
1. From the **Expense Claims for WO Code [**work order code**]** screen,
2. Click on the **row** of the **expense claim** you wish to **edit**.
3. Click on **Edit**.



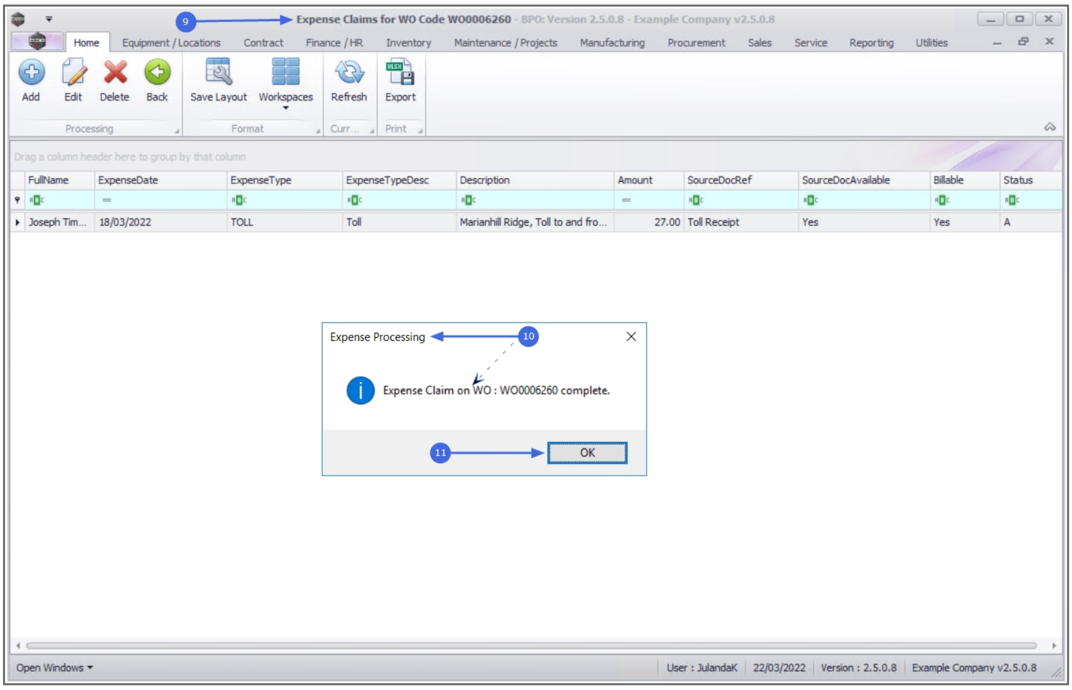
4. When you receive the **Expenses** message to confirm;
   - **Are you sure you want to edit this expense for [**employee name**] on Work Order [**work order code**]?**
5. Click on **Yes**.



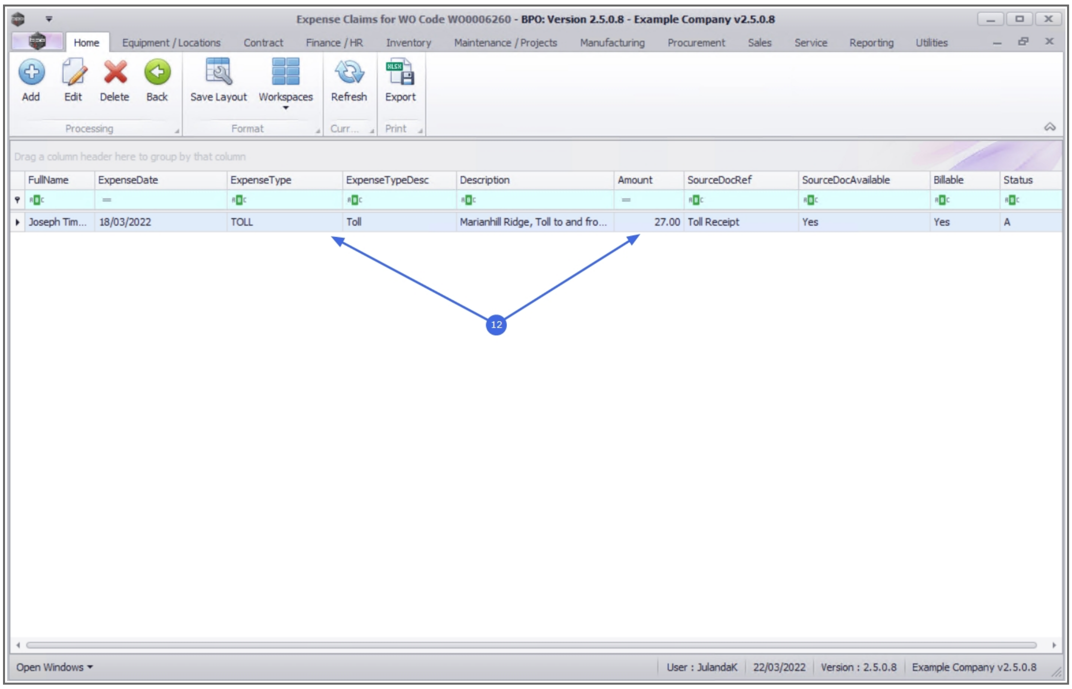
6. The **Expense Entry** screen will be displayed.
7. Make the required changes to the Expense entry.
8. Click on **Save**.



9. You will return to the **Expense Claims for WO Code** screen.
10. An **Expense Processing** message will display informing you that;
    - **Expense Claim on WO: [**work order code**] complete.**
11. Click on **OK**.



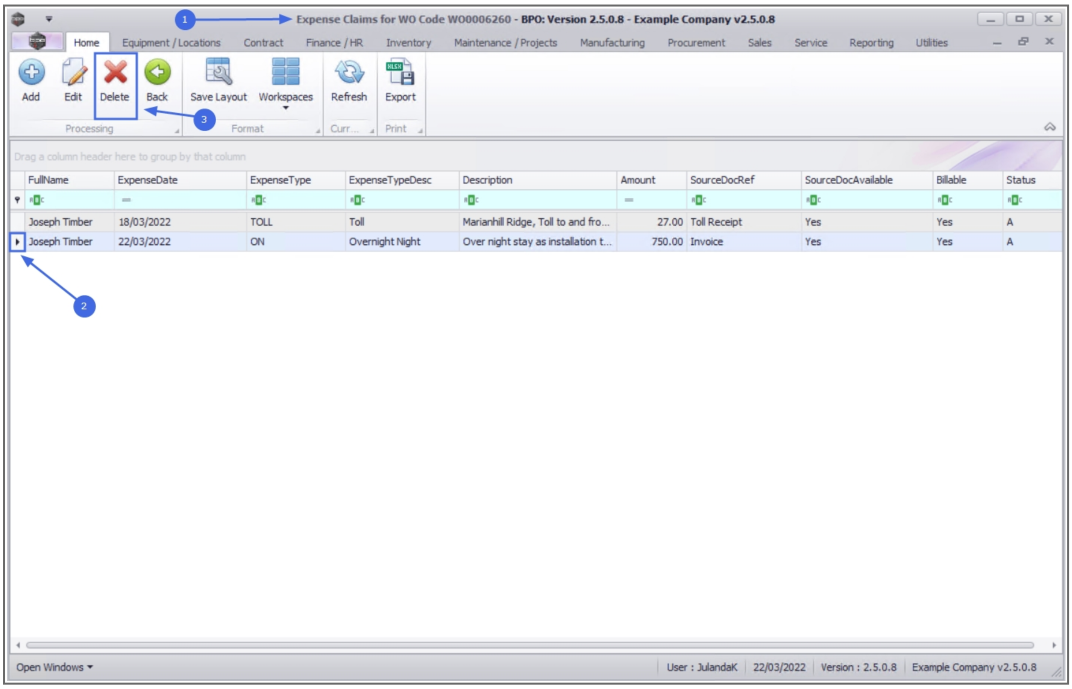
12. The updated details can be viewed in the **Expense Claims for WO Code** screen.



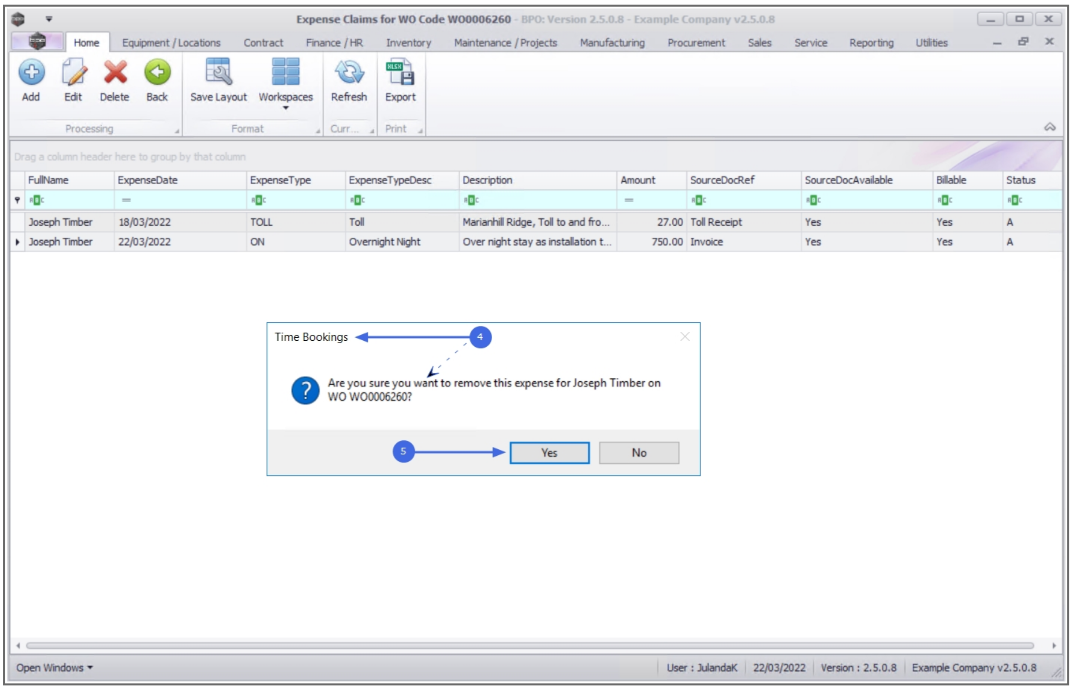
DELETE AN EXPENSE CLAIM

1. From the **Expense Claims for WO Code [**work order code**]** screen,
2. Click on the **row** of the **expense claim** you wish to **delete**.
3. Click on **Delete**.

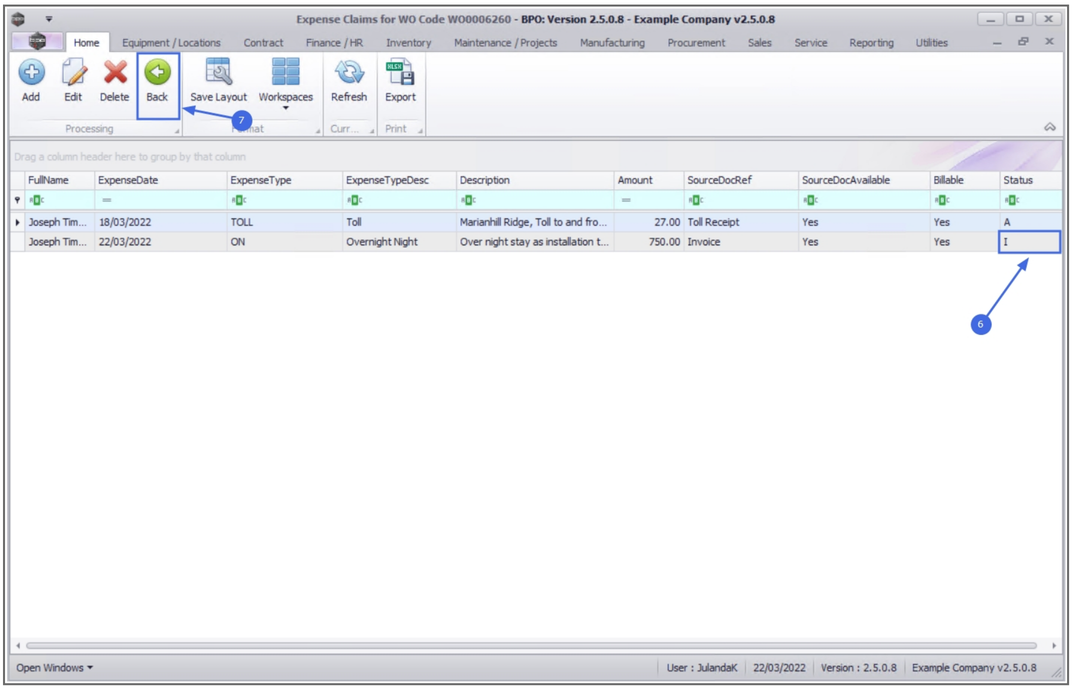
> **Note** that you can only remove an expense with an **A** - Active status.



4. When you receive the **Expenses** message to confirm;
    - **Are you sure you want to remove this expense for [**employee name**] on Work Order [**work order code**]?**
5. Click on **Yes**.



6. The **Status** of the deleted expense will change to **I** - Inactive.
7. Click on **Back** to return to the Work Order Listing screen.



Related Topics

- Basic Static Data

MNU.072.017