

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

# SERVICE

## **WORK ORDERS - EXPENSES**

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

Expenses will be updated automatically for clients using Tech Connect.

Ribbon Access: Service > Work Orders

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- 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**.
- Click on the row of the work order you wish to add an expense claim to.
- 5. Click on the **Expenses** tile.



#### Work Orders - Expenses

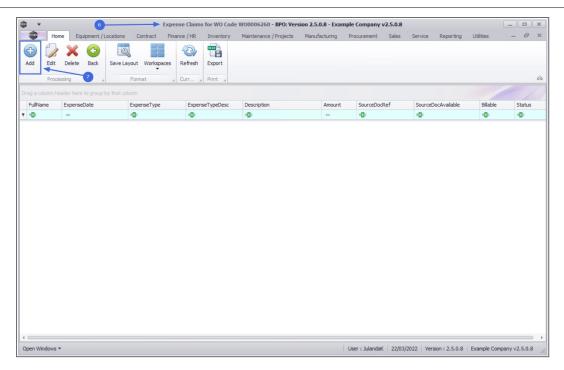
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	· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ0000418	Sc
	· WO0006247	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ0000418	Sc
Meters	· WO0006248	SM		WS - Weekly Service	No		23/11/2021	2	No	PRJ0000420	Sc
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	5 E WO0006250	REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3	No		
Expenses	WO0006251	ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	18/01/2022	3	No		
_	E WO0006252	REP	CN0005300	Printer displaying error code	No	Printer displaying error	18/01/2022	3	No		
		PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3	No		
Travel 1		IMP	CN0005302	New machine implementation. Installation	. No	New machine implemen	24/01/2022	1	No		
	E WO0006257	NDS	CN0005274	PROJ406OR002	No	PRO3406OR002	19/01/2022	2	No		
	WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2	No		
		REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2	Yes		
Documents:		REP	CN0005304	Loan unit required while main unit is being	No	Loan unit required whil	15/03/2022	3	No		

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 <u>is</u> billable. Leave unselected, if the expense is <u>not</u> billable.
- 9. When you have finished adding the expense claim details, click on **Save**.

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- 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.



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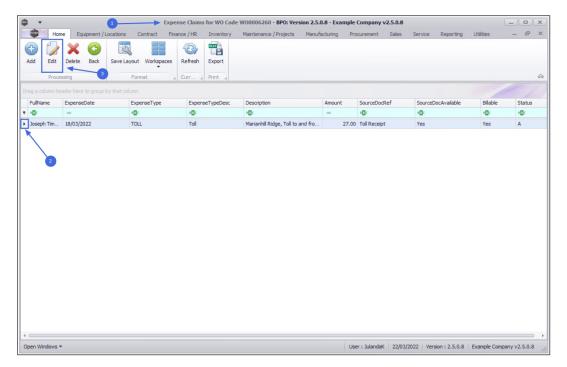
13. The Expense Claim can be viewed in the **Expense Claims for WO Code** screen.

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#### **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.



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

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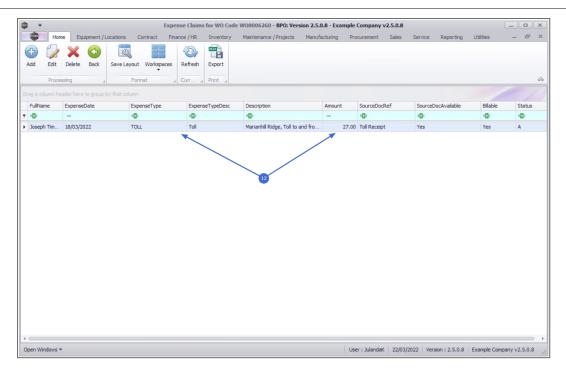


- 9. You will return to the Expense Claims for WO Code screen.
- 10. An **Expense Processing** message will display informing you that;
  - Expense Claim on WO: [work order code] complete.
- 11. Click on OK.

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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.



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- 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**.

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

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#### **Related Topics**

• Basic Static Data

MNU.072.017