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
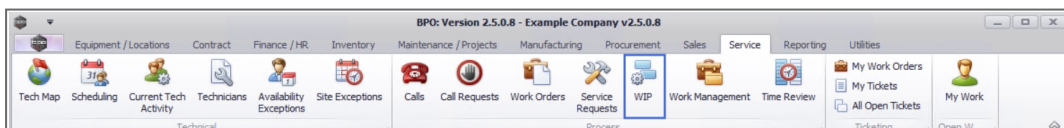
    but have <u>not yet</u> been invoiced.

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: 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.

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

8. The invoice items to be billed will <u>not only</u> 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)
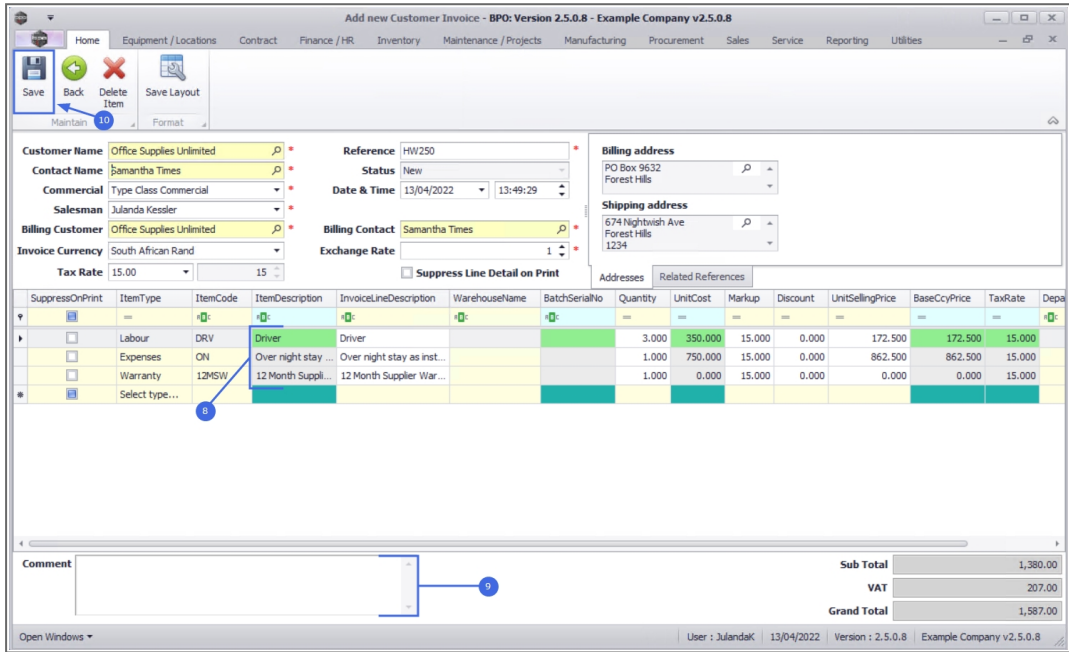
11. You will return to the **Work in Progress** for all work orders screen.

To view the invoice and further invoice processing, refer to Introduction to Sales Invoices.

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