

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.

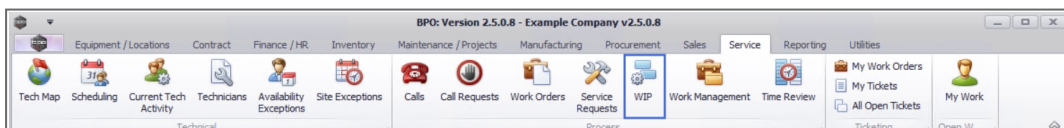
If these items are **non** billable, the work order, call or project will **not** have been closed yet.

Return Requests can be raised for **Internal Assets** to return the item to the **Asset warehouse**.

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**Ribbon Access:** Service > WIP

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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**.

| DocNo      | EventDate  | SourceType | ItemType | ItemCode    | ItemDesc                  | BatchNo        | Quantity | UnitCost  | Billable | WOCode    | WODesc  |
|------------|------------|------------|----------|-------------|---------------------------|----------------|----------|-----------|----------|-----------|---|
| SI00000967 | 15/03/2022 | INVI       | INVN     | SP2020      | SP2020 Sprint Colour ...  | ADJ1-TEST      | 1.000    | 7,500.000 | No       | W00006250 | Paper not feeding through rollers                   |
| SI00000966 | 15/03/2022 | INVI       | INVN     | 2020-998    | Staple Unit               | dr2143         | 1.000    | 3,500.000 | No       | W00006260 | Loan unit required while man unit is being repaired |
| SI00000965 | 14/01/2022 | INVI       | INVN     | 1020-147C   | Toner Cyan                |                | 1.000    | 232.143   | Yes      | W00006244 | 2MS - 2 month service                               |
| SI00000964 | 28/12/2021 | INVI       | INVN     | AM-Copier   | AB Marv Multi Copier 1... | AM2008         | 1.000    | 8,000.000 | Yes      | W00006242 | 1MMS - 1 Month Machine Service                      |
| SI00000964 | 28/12/2021 | INVI       | INVN     | ACR-02      | Acer rollers              | 11111          | 3.000    | 100.000   | Yes      | W00006242 | 1MMS - 1 Month Machine Service                      |
| SI00000964 | 28/12/2021 | INVI       | INVN     | ACR-01      | Acer copier outer shell   | f1234          | 1.000    | 300.000   | Yes      | W00006242 | 1MMS - 1 Month Machine Service                      |
| SI00000964 | 28/12/2021 | INVI       | INVN     | ACR-01      | Acer copier outer shell   | ac34215        | 1.000    | 300.000   | Yes      | W00006242 | 1MMS - 1 Month Machine Service                      |
| SI00000963 | 26/12/2021 | INVI       | INVN     | AM-Copier   | AB Marv Multi Copier 1... | AM2009         | 1.000    | 8,000.000 | Yes      | W00006242 | 1MMS - 1 Month Machine Service                      |
| SI00000962 | 14/12/2021 | INVI       | INVN     | ACR-01      | Acer copier outer shell   | ac1234         | 1.000    | 300.000   | Yes      | W00006089 | 2MS - 2 month service                               |
| SI00000962 | 14/12/2021 | INVI       | INVN     | AM-Copier   | AB Marv Multi Copier 1... | AM2000         | 1.000    | 8,000.000 | Yes      | W00006089 | 2MS - 2 month service                               |
| SI00000962 | 14/12/2021 | INVI       | INVN     | ACR-02      | Acer rollers              | 11111          | 3.000    | 100.000   | Yes      | W00006089 | 2MS - 2 month service                               |
| SI00000962 | 14/12/2021 | INVI       | INVN     | ACR-01      | Acer copier outer shell   | g3452          | 1.000    | 300.000   | Yes      | W00006089 | 2MS - 2 month service                               |
| SI00000961 | 13/12/2021 | INVI       | INVN     | ACR-02      | Acer rollers              | 11111          | 3.000    | 100.000   | Yes      | W00006223 | 1MMS - 1 Month Machine Service                      |
| SI00000960 | 13/12/2021 | INVI       | INVN     | 12-098765   | SP19-12 Black Toner       |                | 1.000    | 361.765   | Yes      | W00006242 | 1MMS - 1 Month Machine Service                      |
| SI00000959 | 30/11/2021 | INVI       | INVN     | SP-ABI-T... | Sprint Toner Black ABI    | AB5001         | 1.000    | 250.000   | Yes      | W00006089 | 2MS - 2 month service                               |
| SI00000959 | 30/11/2021 | INVI       | INVN     | SP2020      | SP2020 Sprint Colour ...  | Z101           | 1.000    | 3,450.000 | Yes      | W00006089 | 2MS - 2 month service                               |
| SI00000958 | 30/11/2021 | INVI       | INVN     | 2020-147K   | Black toner SP2020        |                | 1.000    | 450.000   | Yes      | W00006081 | BathBinMaint - Bathroom Bin Maintenance             |
| SI00000952 | 08/11/2021 | INVI       | INVN     | 2020-147C   | Cyan toner SP2020         |                | 1.000    | 333.053   | Yes      | W00000990 | Part request linked to BOM BPOV2 test               |
| SI00000952 | 08/11/2021 | INVI       | INVN     | 2020-147C   | Cyan toner SP2020         |                | 1.000    | 333.053   | Yes      | W00000990 | Part request linked to BOM BPOV2 test               |
| SI00000951 | 04/11/2021 | INVI       | INVN     | 2020-147K   | Black toner SP2020        | 147K-201706... | 1.000    | 450.000   | No       | W00000304 | AirMaint - Air freshner Maintenance                 |

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.

**Customer Name:** Office Supplies Unlimited  
**Contact Name:** Samantha Times  
**Commercial:** Type Class Commercial  
**Salesman:** Julanda Kessler  
**Billing Customer:** Office Supplies Unlimited  
**Invoice Currency:** South African Rand  
**Tax Rate:** 15.00

**Reference:** HW250  
**Status:** New  
**Date & Time:** 13/04/2022 13:49:29  
**Billing Contact:** Samantha Times  
**Exchange Rate:** 1

**Billing address:** PO Box 9632 Forest Hills  
**Shipping address:** 674 Nightwish Ave Forest Hills 1234

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

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

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

**Customer Name:** Office Supplies Unlimited  
**Contact Name:** Samantha Times  
**Commercial:** Type Class Commercial  
**Salesman:** Julanda Kessler  
**Billing Customer:** Office Supplies Unlimited  
**Invoice Currency:** South African Rand  
**Tax Rate:** 15.00

**Reference:** |  
**Status:** New  
**Date & Time:** 14/04/2022 09:31:33  
**Billing Contact:** Samantha Times  
**Exchange Rate:** 1

**ReferenceType:** ReferenceNo  
 Order No  
 Work Order Reference: WO0006260  
 Serial No: 1912-102035  
 Call Reference  
 Contract No  
 Project Reference

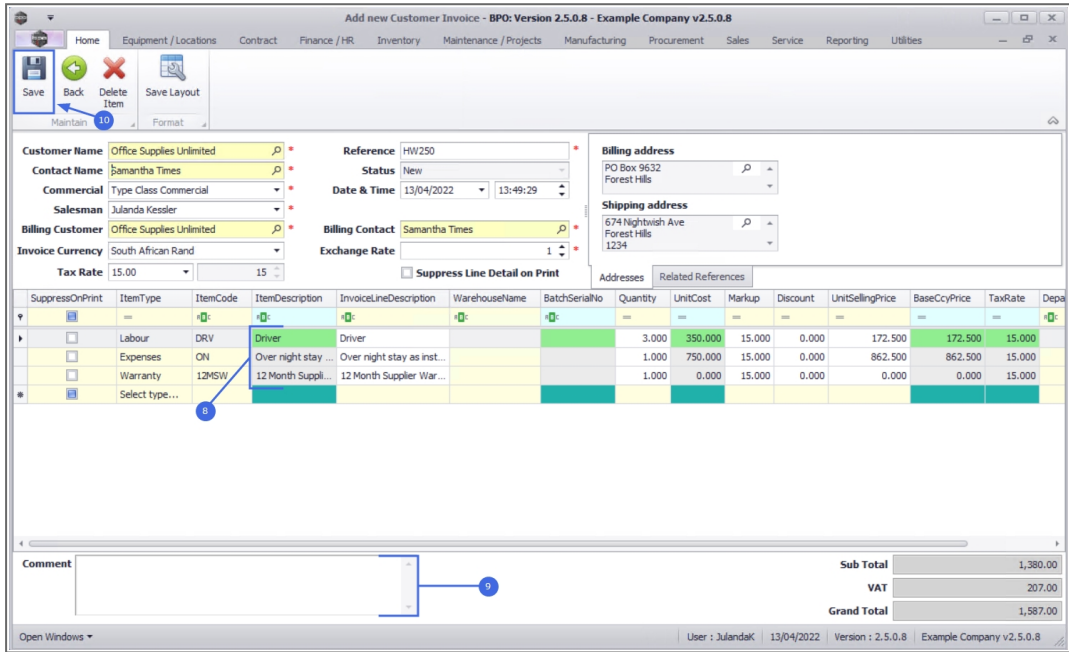
| SuppressOnPrint | ItemType       | ItemCode | ItemDescription     | InvoiceLineDescription     | WarehouseName | BatchSerialNo | Quantity | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice | TaxRate | Department |
|-----------------|----------------|----------|---------------------|----------------------------|---------------|---------------|----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

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


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

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     | 2020-147X   | 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     | 2020-147X   | Black toner SP2020         | 147X-201706... | 1.000    | 450.000   | No       | W00000304 | AirMaint - Airfreshner Maintenance                   | HO     |

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

MNU.077.002

