

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

SERVICE

CALLS – WORK IN PROGRESS

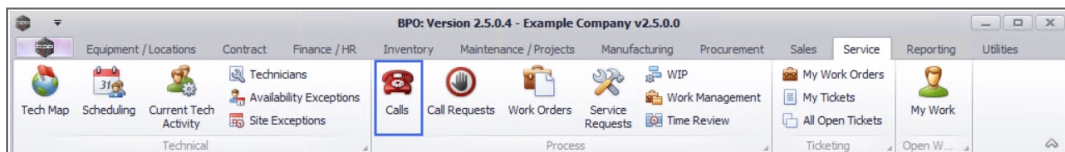
The Work in Progress (WIP) screen displays:

- **Parts** that have been issued or
- **Third Party Services** that have been received
but have not yet been invoiced.

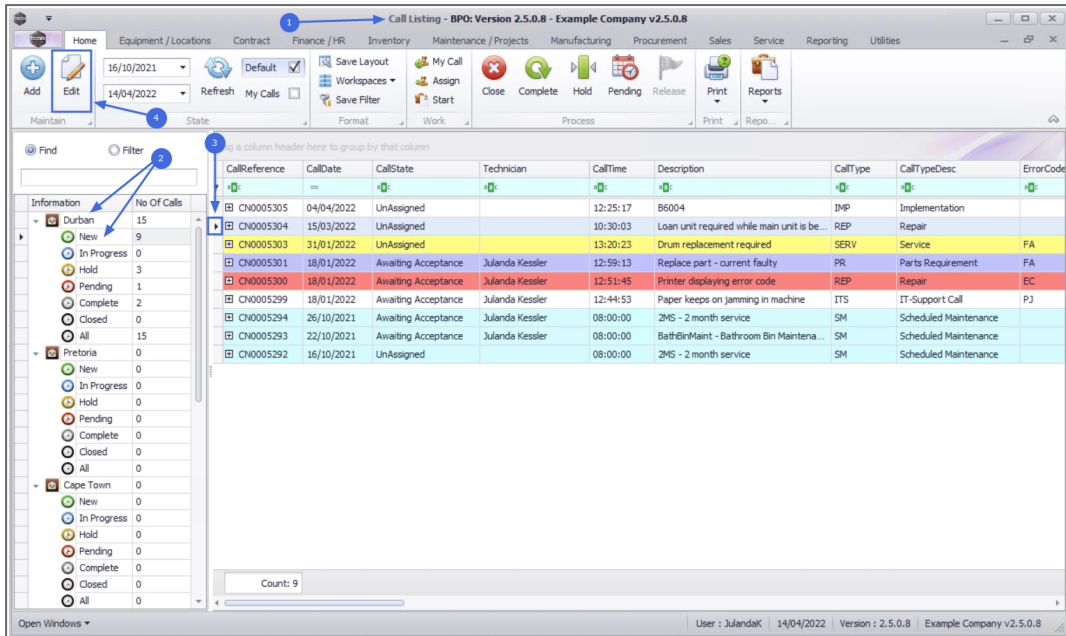
If these items are **non** billable, the work order, call or project will **not** have been closed yet.

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

Ribbon Access: Service > Calls

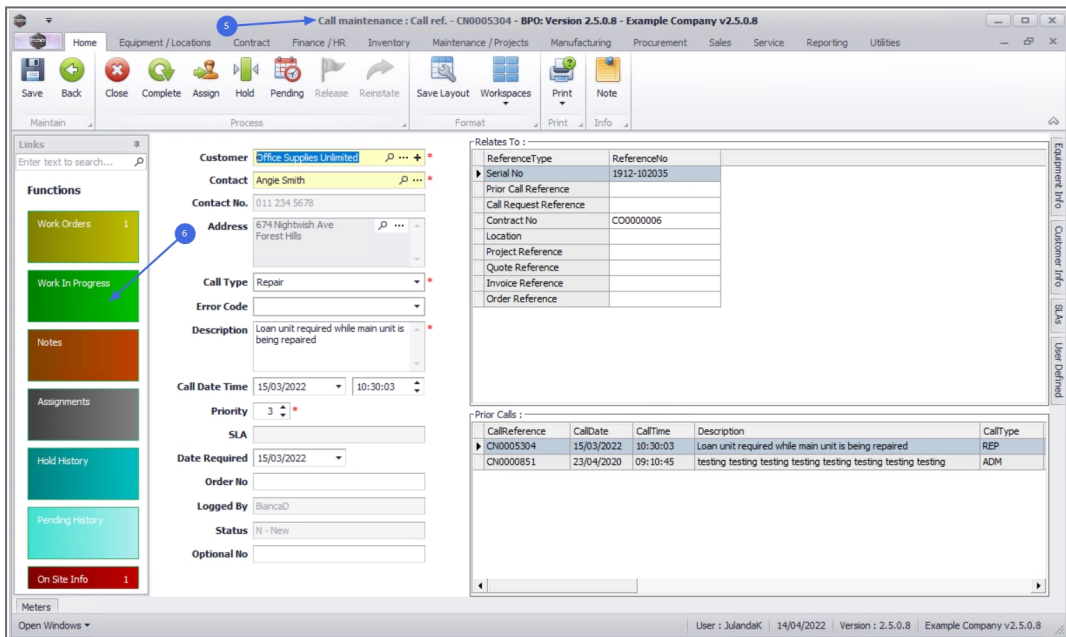


1. The **Call Listing** screen will be displayed.
2. Select the **Site** and **Status**.
 - The example has **Durban** as site and the **New** status selected.
3. Click on the **row** of the call you wish to view the Work in Progress for.
4. Click on **Edit**.



5. The **Call maintenance : Call ref - [call reference number]** screen will display.

6. Click on the **Work In Progress** Tile.



7. The **Work in Progress for Call, Ref No** : [call ref. number] screen will be displayed.

The screen displays both **stock** or **internal assets** that have been issued, as well as **Third Party Services** that have been received

If the items or services are billable, then they have not been invoiced.

If the items are non-billable, the linked work order, call or project has not yet been closed.

8. The **Doc No** column displays the, Work in Progress reference number for a **part** with a **SI** prefix to the number.

- A **service** Work in Progress will display as **SERVICE**.

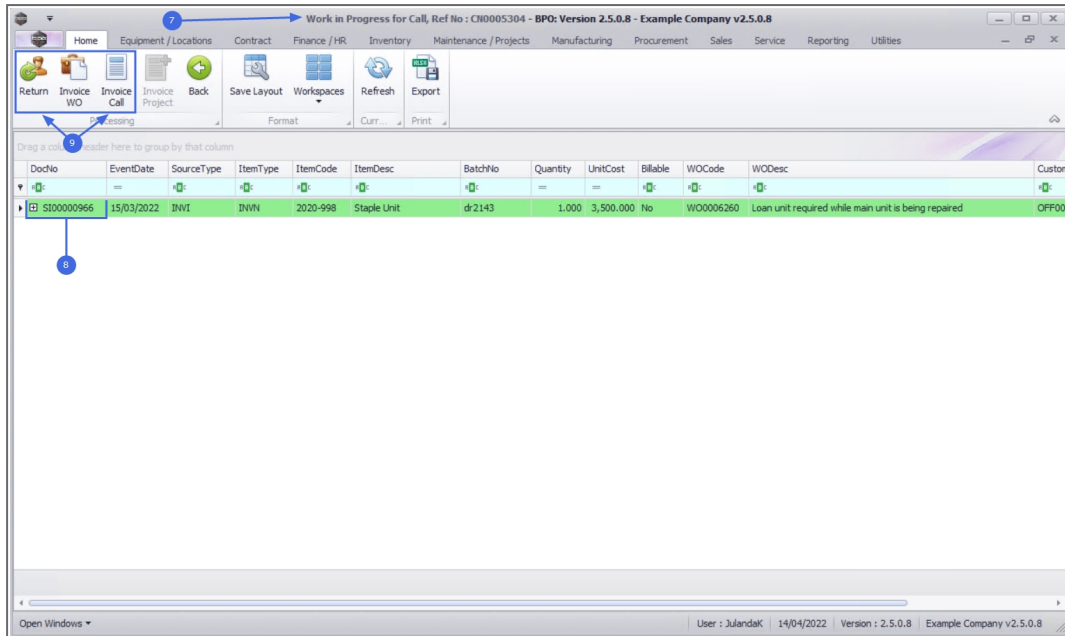
WIP PROCESSING

9. From this screen, you can:

- Do a **Return Request** for an item or service,
- **Invoice** a **work order**, or
- **Invoice Call**.



The **Invoice Project** button has been **greyed out** indicating that a Project cannot be Invoiced from this screen.

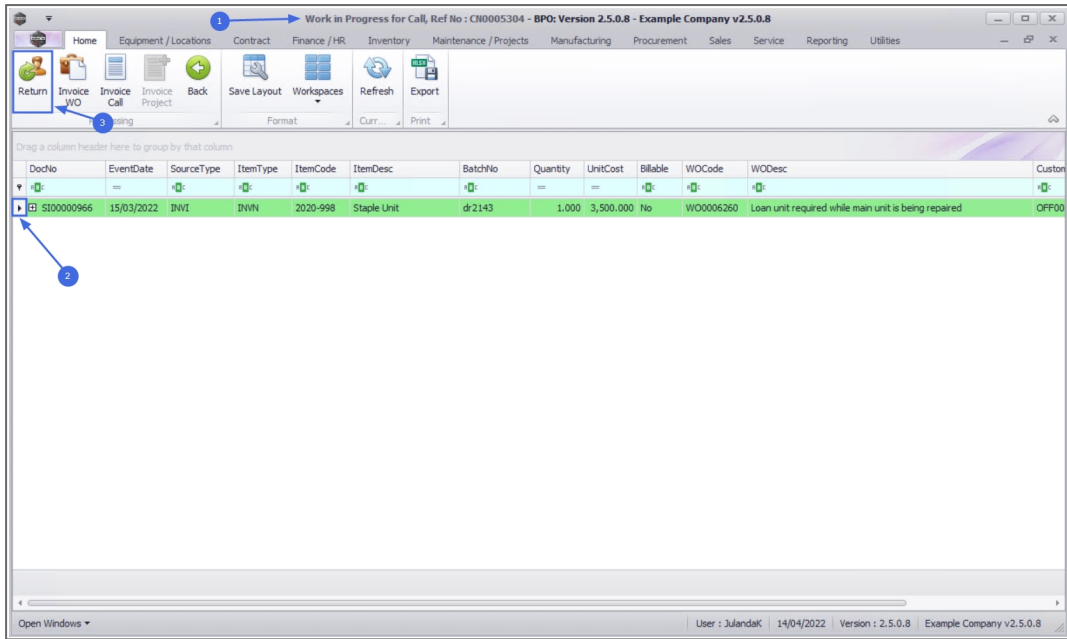


RETURN REQUEST

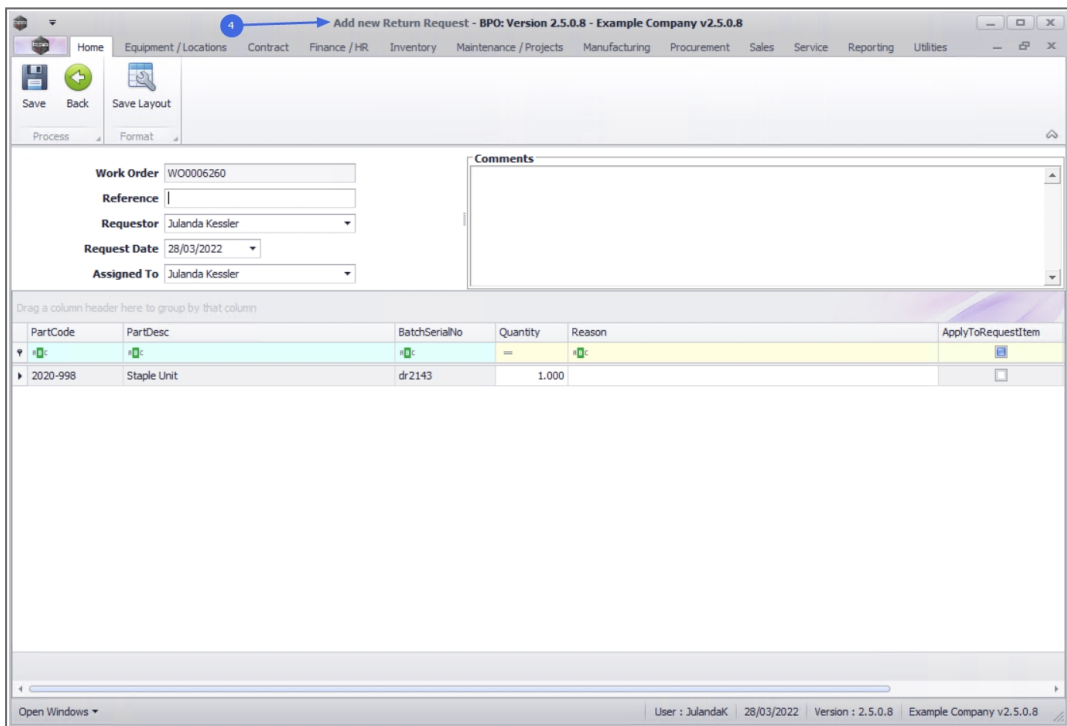
1. From the **Work in Progress for Call, Ref No: [call ref number]** screen,
2. Click on the **row** of the Service or Part you wish to return.
3. Click on the **Return** button.



Short cut key: Right click to display the **Process** menu list. Click on **Return**.



4. "The Add new Return Request screen will be displayed." on page 2

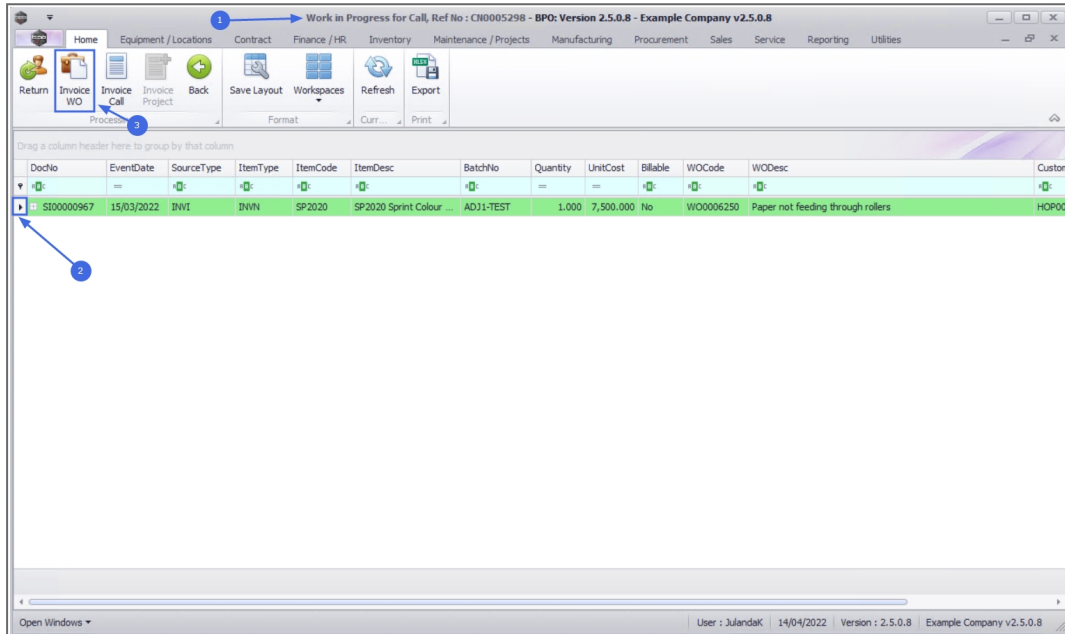


INVOICE WORK ORDER

1. From the **Work in Progress for Call, Ref No. : [call ref number]** screen,
2. Click on the **row** of the Service or Part you wish to Invoice.
3. Click on **Invoice WO**.



Short cut key: Right click to display the **Process** menu list. Click on **Invoice WO**.



4. The Add new Customer Invoice screen will be displayed.

4 → 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
 Contact Name: Commercial
 Salesman: Julanda Kessler
 Billing Customer: Office Supplies Unlimited
 Invoice Currency: South African Rand
 Tax Rate: 15.00

Reference: []
 Status: New
 Date & Time: 28/03/2022 14:25:10
 Billing Contact: []
 Exchange Rate: 1

Billing address []
 Shipping address []

Addresses Related References

| SuppressOnPrint | ItemType | ItemCode | ItemDescription | InvoiceLineDescription | WarehouseName | BatchSerialNo | Quantity | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice |
|-----------------|----------------|----------|-----------------------|-------------------------------|---------------|---------------|----------|----------|--------|----------|------------------|--------------|
| | Expenses | TOLL | Marianhill Ridge, ... | Marianhill Ridge, Toll to ... | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31.050 |
| | Expenses | ON | Over night stay ... | Over night stay as inst... | | | 1.000 | 750.000 | 15.000 | 0.000 | 862.500 | 862.500 |
| | Expenses | TOLL | Marianhill Ridge, ... | Marianhill Ridge, Toll to ... | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31.050 |
| | Expenses | TOLL | Marianhill Ridge, ... | Marianhill Ridge, Toll to ... | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31.050 |
| | Warranty | 12MSW | 12 Month Suppl... | 12 Month Supplier War... | | | 1.000 | 0.000 | 15.000 | 0.000 | 0.000 | 0.000 |
| | Select type... | | | | | | | | | | | |

Comment []

Sub Total: 955.65
 VAT: 143.35
 Grand Total: 1,099.00

Open Windows User: JulandaK 28/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

INVOICE CALL

1. From the **Work in Progress for Call, Ref No: [call ref number]** screen,
2. Click on the **row** of the Service or Part that you wish to invoice.
3. Click on **Invoice Call**.



Short cut key: Right click to display the **Process** menu list. Click on **Invoice Call**.

4. "Invoice Header" on page 2

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