

SERVICE

WORK ORDERS – WORK IN PROGRESS

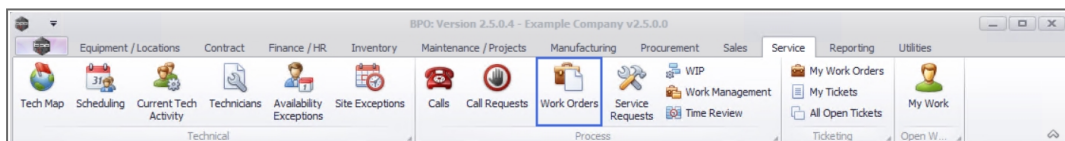
The Work in Progress (WIP) screen displays:

- **Parts** that have been issued or
- **Third Party Services** that have been received

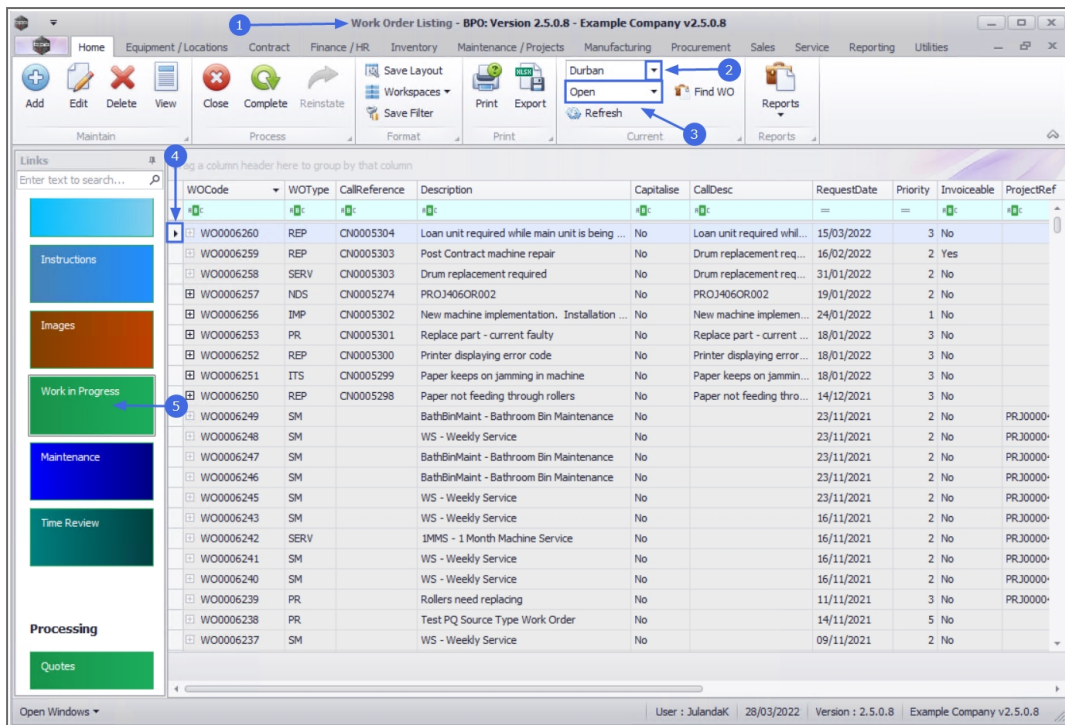
but have not yet been invoiced.

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

Ribbon Access: *Service > Work Orders*



1. The **Work Orders Listing** screen will be displayed.
2. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Click on the **row** of the work order you wish to view the Work in Progress for.
5. Click on the **Work In Progress** tile.



6. The **Work in Progress for WO Code** [work order code] 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/services are billable - they have not been invoiced.
- If the items are non-billable, the linked work order, call or project has not yet been closed.

7. 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**.

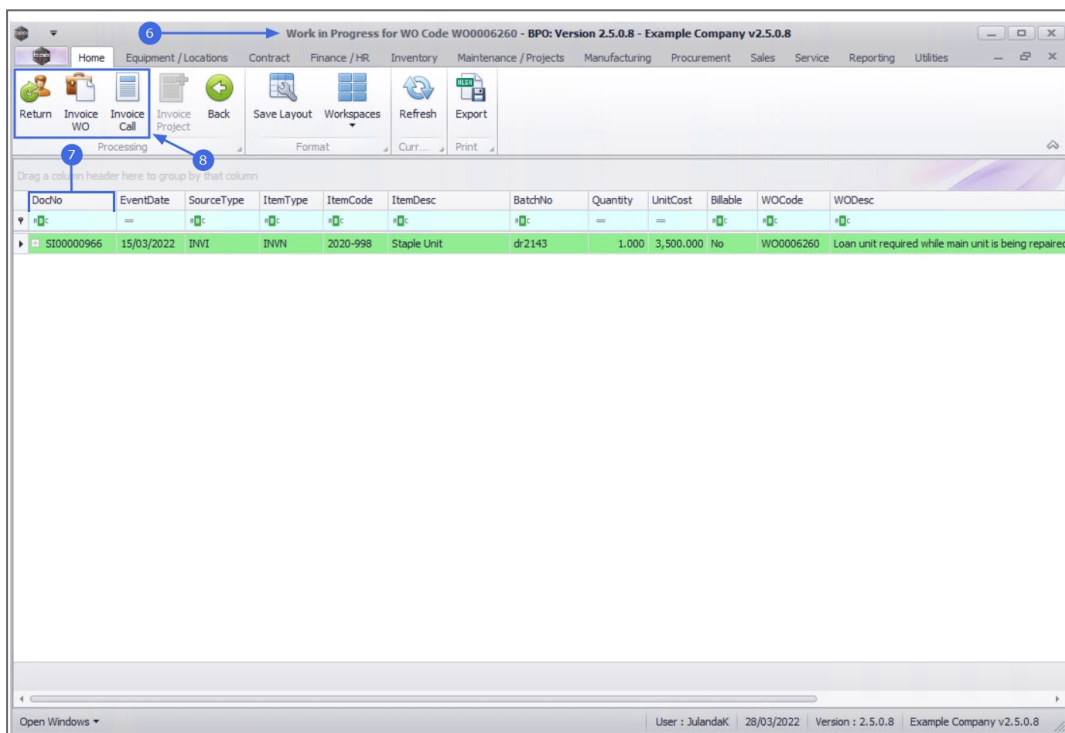
WIP PROCESSING

8. 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.

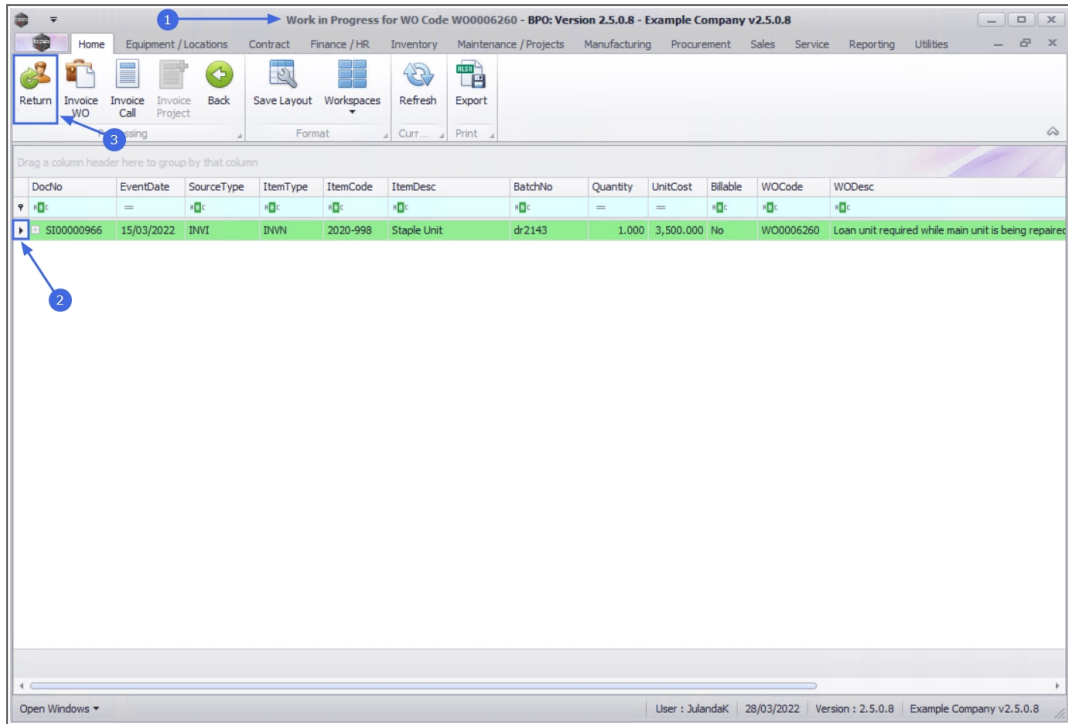


RETURN REQUEST

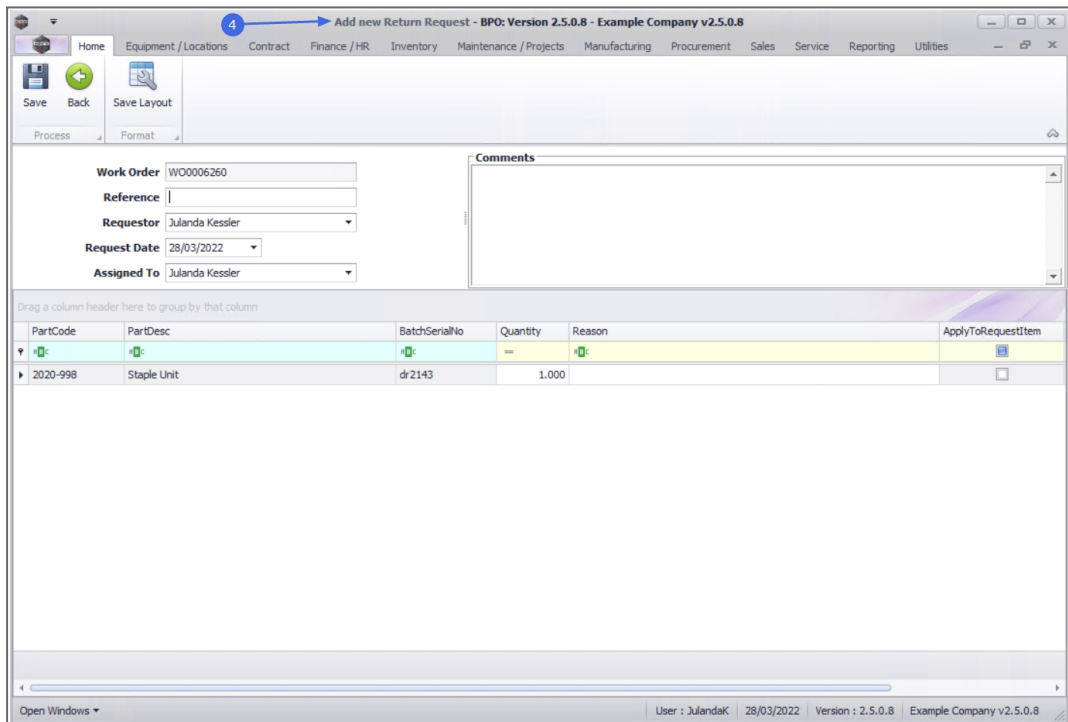
1. From the *Work in Progress for [work order code]* screen,
2. Click on the **row** of the Service or Part you wish to return.
3. Click on the **Return** button.



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

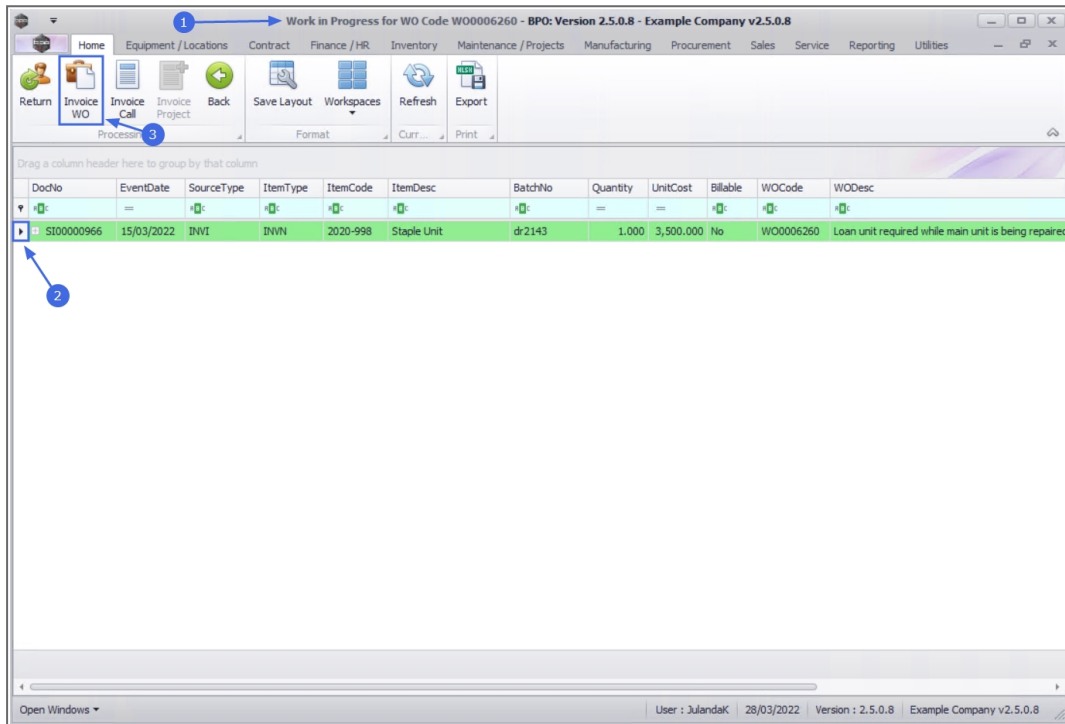


INVOICE WORK ORDER

1. From the **Work in Progress for WO Code [work order code]** 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**.



DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCODE	WODesc
SI00000966	15/03/2022	INVT	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired

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



Refer to [Work in Progress - Invoice Work Orders](#) for details on how to complete the Customer Invoice screen.

INVOICE CALL

1. From the **Work in Progress for WO Code [work order code]** 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**.

Work in Progress for WO Code W00006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000966	15/03/2022	INVI	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	W00006260	Loan unit required while main unit is being repaired

4. "Invoice Header" on page 2

Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Reference: [Empty]
 Status: New
 Date & Time: 28/03/2022 14:27:06
 Billing Contact: [Empty]
 Exchange Rate: 1

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

Suppress Line Detail on Print

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
<input type="checkbox"/>	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
<input type="checkbox"/>	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500
<input type="checkbox"/>	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
<input type="checkbox"/>	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
<input type="checkbox"/>	Warranty	12MSW	12 Month Suppli...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000
<input type="checkbox"/>	Select type...											

Comment: [Empty]

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

MNU.072.015

