

SERVICE

WORK IN PROGRESS – INVOICE WORK ORDERS

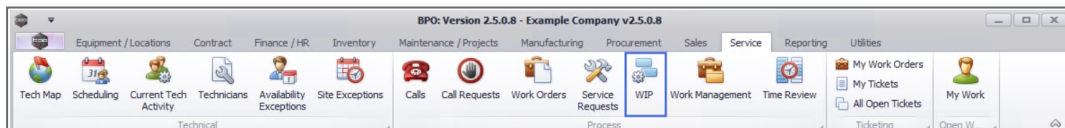
The Work in Progress (WIP) screen displays:

- **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**.

Ribbon Access: *Service > WIP*



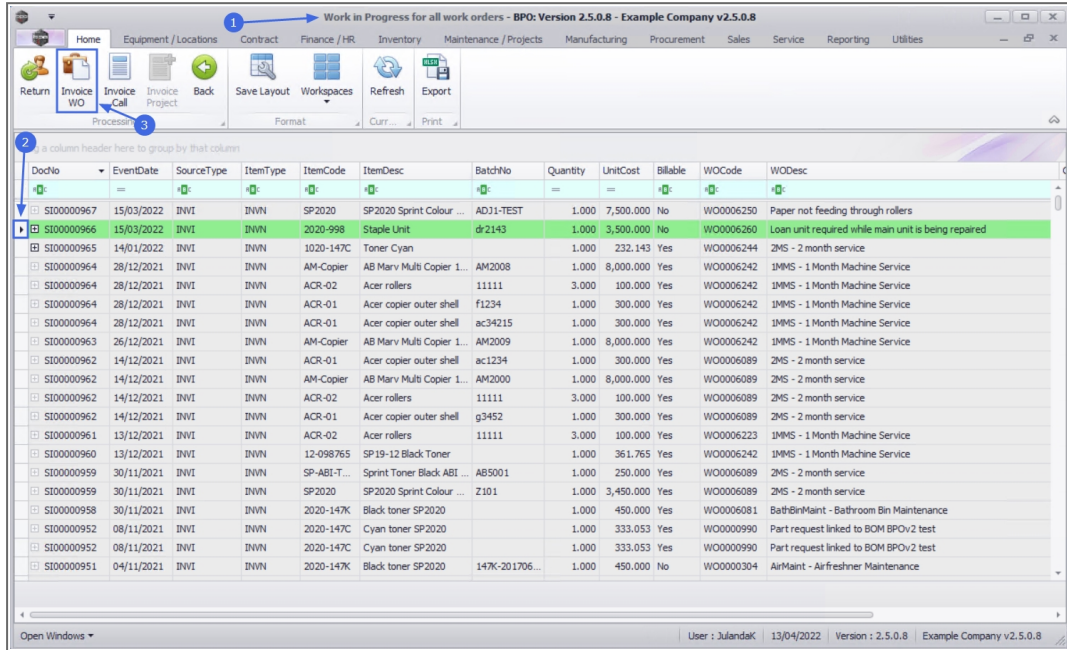
1. The **Work in Progress for all work orders** listing screen will be displayed.

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**.



DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc
SI00000967	15/03/2022	INVI	INVN	SP2020	SP2020 Sprint Colour ...	AD31-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers
SI00000966	15/03/2022	INVI	INVN	2020-998	Staple Unit	dr-2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired
SI00000965	14/01/2022	INVI	INVN	1020-147C	Toner Cyan		1.000	232.143	Yes	WO0006244	ZMS - 2 month service
SI00000964	28/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2008	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000963	26/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2009	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	ZMS - 2 month service
SI00000962	14/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2000	1.000	8,000.000	Yes	WO0006089	ZMS - 2 month service
SI00000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	ZMS - 2 month service
SI00000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	ZMS - 2 month service
SI00000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	IMMS - 1 Month Machine Service
SI00000960	13/12/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	IMMS - 1 Month Machine Service
SI00000959	30/11/2021	INVI	INVN	SP-AB1-T...	Sprint Toner Black ABI...	AB5001	1.000	250.000	Yes	WO0006089	ZMS - 2 month service
SI00000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour ...	Z101	1.000	3,450.000	Yes	WO0006089	ZMS - 2 month service
SI00000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance
SI00000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test
SI00000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	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	WO0000304	AirMaint - Airfreshner 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.

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 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

Suppress Line Detail on Print

SuppressOnPrint	Item type	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 Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000	15.000	
	Select type...													

Comment

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

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

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 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
 Order No
 Work Order Reference W00006260
 Serial No 1912-102035
 Call Reference
 Contract No
 Project Reference

Suppress Line Detail on Print

SuppressOnPrint	Item type	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 Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000	15.000	
	Select type...													

Comment

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

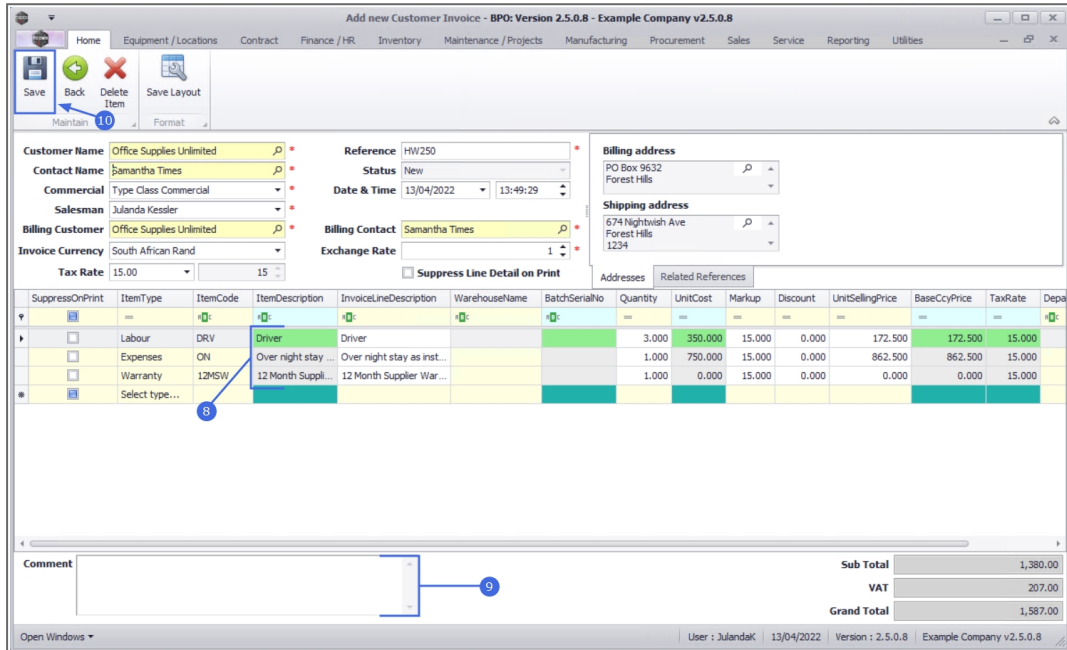
Open Windows User : JulandaK 14/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

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 \(OTC\)](#)



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: 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

☐ Suppress Line Detail on Print

SuppressOnPrint	Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch/Serial No	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Cost Price	Tax Rate	Depa
☐	Labour	DRV	Driver	Driver			3.000	350.000	15.000	0.000	172.500	172.500	15.000	
☐	Expenses	ONI	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 Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000	15.000	
☐	Select type...													

Comment: [Text Box]

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

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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 for all work orders - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Return Invoice WO Invoice Call Invoice Project Back Save Layout Workspaces Refresh Export

Processing Format Curr... Print

Drag a column header here to group by that column

DocNo	EventDa...	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc	Custom
SI00000966	15/03/2022	INVI	INVN	2020-998	Staple Unit	d2143	1.000	3,500.000	No	WO0006260	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	WO0006250	Paper not feeding through rollers	HO
SI00000965	14/01/2022	INVI	INVN	1020-147C	Toner Cyan		1.000	232.143	Yes	WO0006244	ZMS - 2 month service	GRJ
SI00000964	28/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2008	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEJ
SI00000964	28/12/2021	INVI	INVN	ACR-02	Acer rollers	111111	3.000	100.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEJ
SI00000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	f1234	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEJ
SI00000964	28/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac34215	1.000	300.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEJ
SI00000963	26/12/2021	INVI	INVN	AM-Copier	AB Marv Multi Copier 1...	AM2009	1.000	8,000.000	Yes	WO0006242	IMMS - 1 Month Machine Service	BEJ
SI00000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	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	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVI	INVN	ACR-02	Acer rollers	111111	3.000	100.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVI	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000961	13/12/2021	INVI	INVN	ACR-02	Acer rollers	111111	3.000	100.000	Yes	WO0006223	IMMS - 1 Month Machine Service	BEJ
SI00000960	13/12/2021	INVI	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006242	IMMS - 1 Month Machine Service	HO
SI00000959	30/11/2021	INVI	INVN	SP-ABI-T...	Sprint Toner Black ABI ...	AB5001	1.000	250.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000959	30/11/2021	INVI	INVN	SP2020	SP2020 Sprint Colour ...	Z101	1.000	3,450.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000958	30/11/2021	INVI	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	BathBinMaint - Bathroom Bin Maintenance	WE
SI00000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
SI00000952	08/11/2021	INVI	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
SI00000951	04/11/2021	INVI	INVN	2020-147K	Black toner SP2020	147K-201706...	1.000	450.000	No	WO0000304	AirMaint - Airfreshner Maintenance	

Open Windows

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