

SERVICE

WORK IN PROGRESS – INVOICE PROJECT

The Work in Progress (WIP) screen displays:

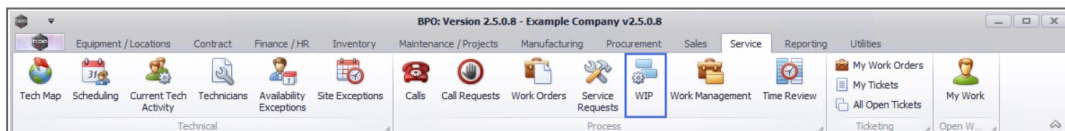
- **Parts** that have been issued or
- **Third Party Services** that have been received

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.
2. Click on the row of the *item* or *service* you wish to invoice.



Note that if the item you have selected is linked to a *Project*, the *Invoice Project* button in the ribbon will be activated.

3. Click on *Invoice Project*.

4. The Add new Customer Invoice screen will display.

You will note that the *Customer Details* would have been populated.

You will need to add a *Reference No.*, as well as search for the correct *Contact Name*, *Billing Customer* and *Billing Contact*, if more than one has been set up for the customer.

5. When you have finished editing the details on this screen, click on **Save**

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

5 → Save

Customer Name: Bearing and Shoe
 Contact Name: Julanda Kessler
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Bearing and Shoe
 Invoice Currency: South African Rand
 Tax Rate: 15.00

Reference: PRJ408/BS001
 Status: New
 Date & Time: 14/04/2022 11:09:27
 Billing Contact: John Bearing
 Exchange Rate: 1
☐ Suppress Line Detail on Print

Billing address: PO Box 1234, New Town
 Shipping address: PO Box 1234, New Town, Forest Hills

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	Department
☐	Parts	12-098765	SP19-12 Black Toner	SP19-12 Black Toner	Main Warehouse		1.000	361.765	0.000	0.000	420.000	420.000	15.000	
☐	Parts	AM-Copier	AB Marv Multi C...	AB Marv Multi Copier 1...	George Whse	AM2009	1.000	8,000.000	15.000	0.000	9,200.000	9,200.000	15.000	
☐	Parts	ACR-01	Acer copier outer shell	Acer copier outer shell	Main Warehouse	ac34215	1.000	300.000	0.000	0.000	345.000	345.000	15.000	
☐	Parts	ACR-01	Acer copier outer shell	Acer copier outer shell	Main Warehouse	f1234	1.000	300.000	0.000	0.000	345.000	345.000	15.000	
☐	Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	11111	3.000	100.000	0.000	0.000	115.000	115.000	15.000	
☐	Parts	AM-Copier	AB Marv Multi C...	AB Marv Multi Copier 1...	Main Warehouse	AM2008	1.000	8,000.000	15.000	0.000	9,200.000	9,200.000	15.000	

Comment:
 Sub Total: 19,855.00
 VAT: 2,978.25
 Grand Total: 22,833.25

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6. 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**.

6 → Work in Progress for all work orders - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Return Invoice 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	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc	Custom
SI00000966	15/03/2022	INVT	INVN	2020-998	Staple Unit	4-2143	1.000	3,500.000	No	WO0006260	Loan unit required while main unit is being repaired	OF
SI00000967	15/03/2022	INVT	INVN	SP2020	SP2020 Sprint Colour ...	ADJ1-TEST	1.000	7,500.000	No	WO0006250	Paper not feeding through rollers	HO
SI00000962	14/12/2021	INVT	INVN	ACR-01	Acer copier outer shell	ac1234	1.000	300.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVT	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	INVT	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000962	14/12/2021	INVT	INVN	ACR-01	Acer copier outer shell	g3452	1.000	300.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000961	13/12/2021	INVT	INVN	ACR-02	Acer rollers	11111	3.000	100.000	Yes	WO0006223	IMMS - 1 Month Machine Service	HO
SI00000959	30/11/2021	INVT	INVN	SP-AB1-T...	Sprint Toner Black AB1...	AB5001	1.000	250.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000959	30/11/2021	INVT	INVN	SP2020	SP2020 Sprint Colour ...	Z101	1.000	3,450.000	Yes	WO0006089	ZMS - 2 month service	HO
SI00000958	30/11/2021	INVT	INVN	2020-147K	Black toner SP2020		1.000	450.000	Yes	WO0006081	Bath/Bin/Maint - Bathroom Bin Maintenance	WE
SI00000952	08/11/2021	INVT	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
SI00000952	08/11/2021	INVT	INVN	2020-147C	Cyan toner SP2020		1.000	333.053	Yes	WO0000990	Part request linked to BOM BPOv2 test	HO
SI00000951	04/11/2021	INVT	INVN	2020-147K	Black toner SP2020	147K-201706...	1.000	450.000	No	WO0000304	Air/Maint - Airfreshener Maintenance	HO
SI00000948	19/10/2021	INVT	INVN	SP220	SP220 Machine	SP2020-0100	1.000	5,000.000	Yes	WO0006135	PRJ408/1	OFI
SI00000948	19/10/2021	INVT	INVN	SP220	SP220 Machine	SP2020-0101	1.000	5,000.000	Yes	WO0006135	PRJ408/1	OFI
SI00000946	12/10/2021	INVT	INVN	2020-147K	Black toner SP2020		2.000	396.111	Yes	WO0000526	Air/Maint - Airfreshener Maintenance	TTA
SI00000945	07/10/2021	INVT	INVN	12-098765	SP19-12 Black Toner		1.000	361.765	Yes	WO0006131	1818-1-1 - Check network requirements	HO
SI00000943	05/10/2021	INVT	INVN	9855632	Air Freshener		1.000	22.641	No	WO0000371	WS - Weekly Service	HO
SI00000944	05/10/2021	INVT	INVN	19-687	Drum	12345	1.000	1,000.000	No	WO0000202	Drum replacement required	HO
SI00000941	04/10/2021	INVT	INVN	SP2020	SP2020 Sprint Colour ...	cheesy1	1.000	4,500.000	Yes	WO0000215	New machine	SAI

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