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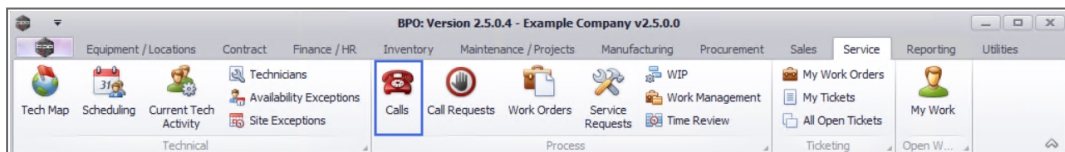
SERVICE

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 <u>not yet</u> 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 Asset**s 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 **Statu**s.
   - 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 <u>not</u> been invoiced.
>
> If the items are non-billable, the linked work order, call or project has
> <u>not</u> 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.
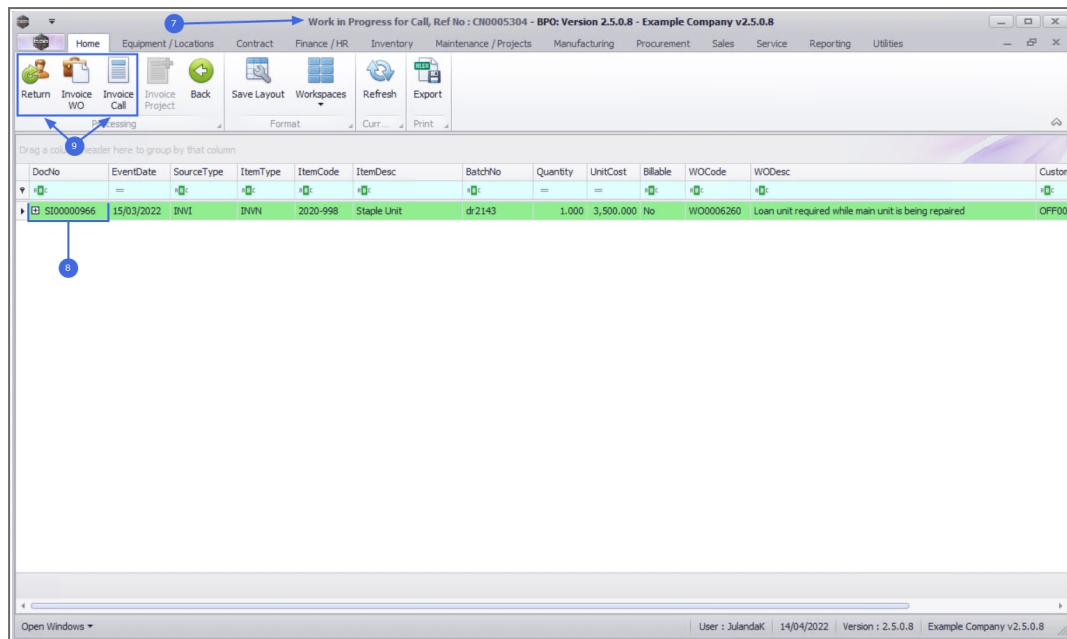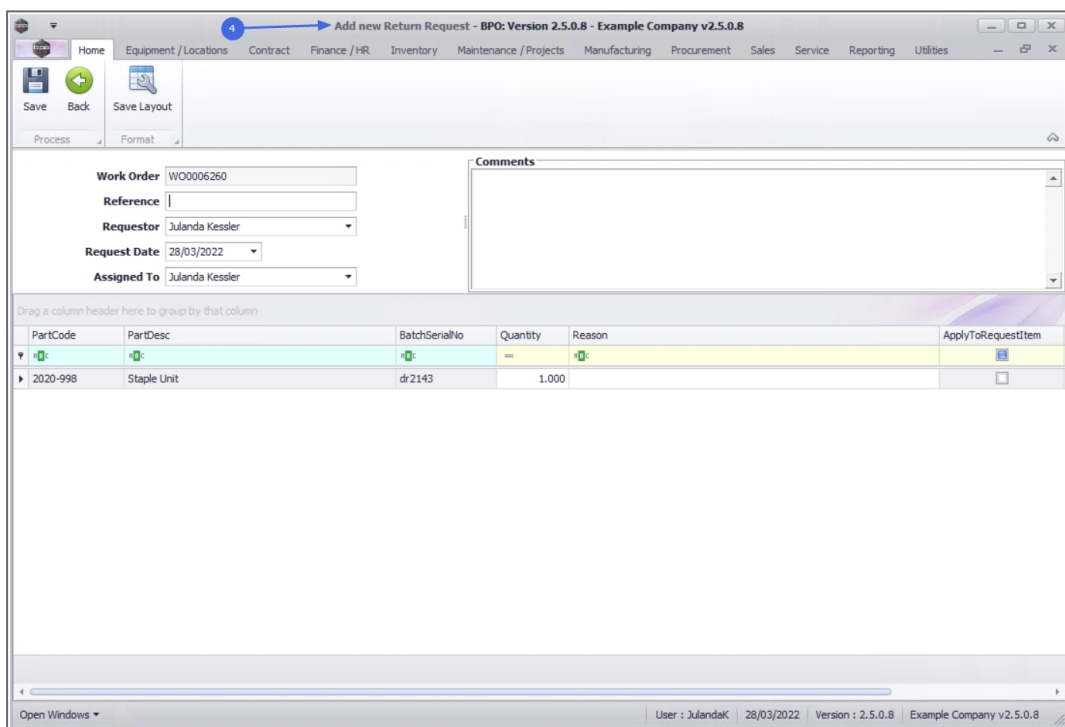
RETURN REQUEST

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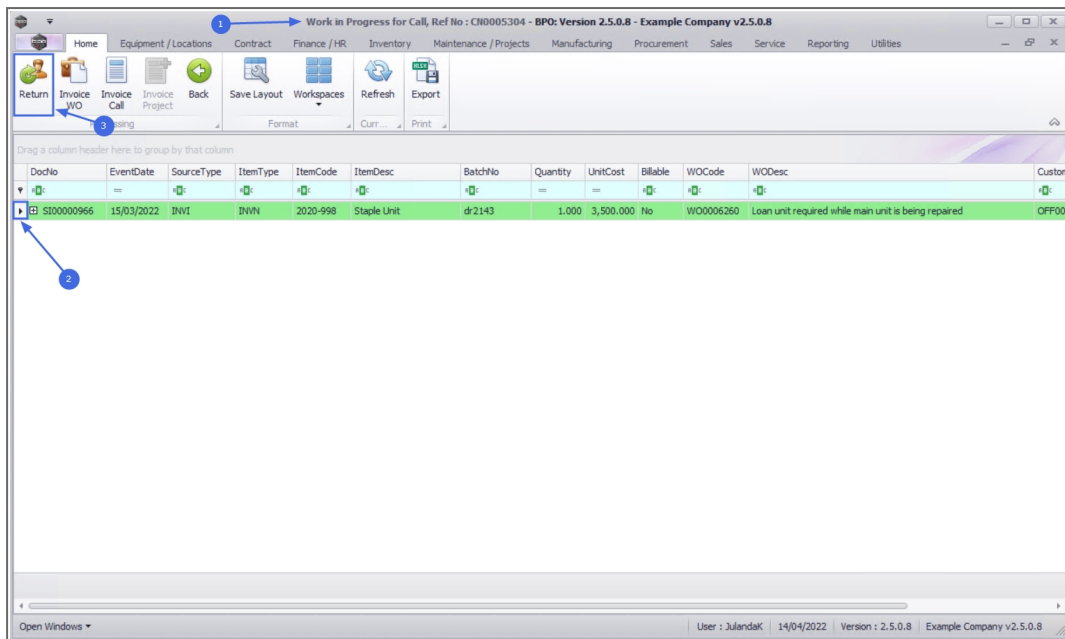
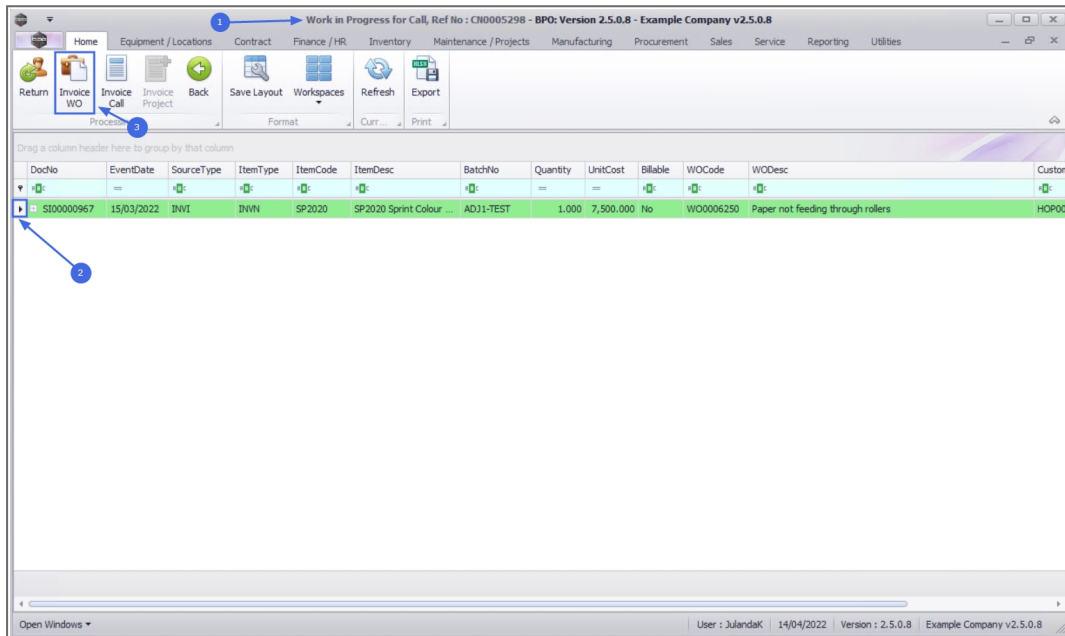4. "The Add new Return Request screen will be displayed. " on page 2

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.

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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