



## Work Instruction

### Viewing Jobs for Invoicing (Facilities Manager)

Facilities Managers (FM's) have a similar view from the Invoicing tab with additional functionality to raise Invoices. The FM will select the claims to be included on a *Tax Invoice* and assign an Invoice Number to the group of claims. This produces an invoice for payment to the Facilities Management Provider.

**To view jobs ready for Invoicing as a Facilities Manager, complete the following steps:**

1. Select the Agency from the Asset List pane. (**Note:** alternatively, FM's can select individual Assets).
2. Select the Invoicing tab from the Works Tabs pane.
3. Select the To be invoiced radio button. (**Note:** results will appear in the display window. Large lists may take some time to compile results).
4. Select the required jobs from the display window
  - Mouse-click to select individual jobs
  - OR search jobs using the top row search fields i.e. Job Indent can search all district jobs that being with 90/
  - Click the Select All button to highlight the entire list.
  - Click the Clear Selection to deselect the entire list

The screenshot shows the 'Invoicing' tab selected in the top navigation bar. Below the navigation bar, there are three radio buttons: 'To be invoiced' (selected), 'Invoices pending', and 'Invoices to be released'. A table of jobs is displayed with the following columns: Job Indent, Remote Request ID, Note, Claim, Adj, Job Type, Class, Asset, and Job Description. The table contains 20 rows of data, all of which are selected (indicated by checkmarks in the first column). At the bottom of the interface, there are buttons for 'Select All', 'Clear Selection', and 'Invoice..'. A 'Current Invoice Total' is shown as '\$11,219.52', and a red box highlights the 'Invoice amount' field.

Job Indent	Remote Request ID	Note	Claim	Adj	Job Type	Class	Asset	Job Description	v
10534644			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER ALLIANCE LOCKSMITH/SECURITY CO.	LOC
10534587			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER VAN 229 - BLDG 1 - DOOR CLOSER.	CAR
10534255			100	0	BREAKDOWN MAINTENANCE	U	01013	ATT VAN 298/BLDG 3/TOILETS/CISTERN CO.	PLU
10534150			100	0	BREAKDOWN MAINTENANCE	U	01013	ATT VAN 229/BLDG 3/TRADE SCHOOL/TOILE.	CAR
10534020			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER ALLIANCE L/S- REPLACE/REPAIR I.	LOC
10534019			100	0	BREAKDOWN MAINTENANCE	U	01013	TREAT ACTIVE ANT NESTS	PES
10533683			100	0	BREAKDOWN MAINTENANCE	U	01013	ATT VAN 298/BLDG 1/RPR LEAKING TAP TO.	PLU
10532608			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER ALLIANCE L/S/ MAKE ADMIN ENTRA.	LOC
10528914			100	0	BREAKDOWN MAINTENANCE	U	01013	PEFER ADEL COMM ELEC/BLD 4/RELAY IS M.	ELE
10527385			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER ADELAIDE COMM ELECTRICAL/ADJUS.	ELE
10526962			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER ADELAIDE COMMERCIAL ELEC/ASSES.	ELE
10524554			100	0	BREAKDOWN MAINTENANCE	U	01013	PREFER ADELAIDE COMMERCIAL ELEC/BLDGS.	ELE
10522991			100	0	BREAKDOWN MAINTENANCE	U	01013	ATT ADELAIDE COMM EL ONSITE/GROUNDS/R.	ELE
10513720			100	0	BREAKDOWN MAINTENANCE	U	01013	PEFER ADEL COMM ELEC/BLD 31/LIGHTS TR.	ELE
10513261			100	0	PREVENTATIVE MAINTENANCE	S	01013	EQUIPMENT JAN 2015 PREVENTATIVE MAINT.	
10513258			100	0	PREVENTATIVE MAINTENANCE	S	01013	LIFTS DEC 2014 PREVENTATIVE MAINTENAN.	
10513257			100	0	PREVENTATIVE MAINTENANCE	S	01013	FIRE DEC 2014 PREVENTATIVE MAINTENANC.	
10513247			100	0	PREVENTATIVE MAINTENANCE	S	01013	EQUIPMENT SEP 2014 PREVENTATIVE MAINT.	



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Click the Invoice button. (**Note:** the *Invoice Jobs* box will be displayed).

6. Enter the invoice number in the Invoice No: field.

7. Click the Submit button or Cancel to exit.

**Invoice Jobs**

Vendor To Pay: DPTI BUILDING MAINTENANCE

Invoice No: Enter the invoice No

Submit Cancel Print