



#327246 Service Call - invoice incorrect chargeable items missing SC260665

Submitted29 November 2021 at 16:02

Received viaWeb Form

RequesterGeorgia Duncan <georgia.duncan@terracat.co.nz>

CCs
IT Service Desk <servicedesk@terracat.co.nz>

StatusSolved

TypeProblem

PriorityNormal

GroupService Desk

AssigneeJess Beattie

Category
NAXT

Stephanie Lister November 29, 2021 at 4:02 PM

Service segments (1 - ggnz) - Segment id: SC260665-01, Finished, Call number: SC260665

File

Service segments

Manage

Warranty

Parts and Labour

Related information

Segment

From component structure

Edit

Delete

Equipment disassembly

Quotation

Start segment

Technician complete

Finish segment

Reopen

Cancel

Create invoice proposals

Service call closing summary

Operations

Add standard job

Standard job

Delivery note

Express picking journal

Post items

Refresh

Export to Microsoft Excel

List

Attachments

Segment id

Report

Quoted

Credited

Split

Seq#

Job code

Component

Modifier code

Need by date

Description

Shop/Field

Status

Credit status

Serial number

Standard job

Invoice acc...

Warranty type

Last day ...

Invoice i

SC260665-01

540

7534

10/11/2021

Perform - 250 Service Hour Maintenance

Shop

Finished

Passed

JEY00469

SJ0023169

S001003

24/11/20...

Segment details

Items

Hours

Misc. Items

Misc. Costs

Part transactions

Estimate: 388.89

Fiat rate: 365.86

Actual: 388.89

Consumed percentage: 106.29 %

Labour transactions

Estimate: 360.00

Fiat rate: 345.00

Actual: 360.00

Consumed percentage: 104.35 %

Unposted hours: 03:00

Posted hours: 03:00

Invoiced hours: 00:00

Misc transactions

Estimate: 26.74

Fiat rate: 24.96

Actual: 26.74

Consumed percentage: 107.13 %

Transaction total

Estimate: 775.63

Fiat rate:

Actual: 775.63

Service segment identifier

NZD

ggnz

Close

4:01 pm

29/11/2021

Georgia Duncan November 29, 2021 at 4:04 PM

Hi Stephanie,

Sorry I don't know why the call cut out, I tried calling back but it cut out again.

Georgia Duncan
Service Advisor - Terra Cat
DDI: +6436681224
E: Georgia.Duncan@terracat.co.nz | W: terracat.co.nz |  



From: Stephanie Lister (IT Service Desk) <itsd@terracat.co.nz>
Sent: Monday, 29 November 2021 4:03 pm
To: Georgia Duncan <Georgia.Duncan@terracat.co.nz>
Subject: 327246 [Request Received] Service Call - invoice incorrect chargeable items missing SC260665

Your request ([#327246](#)) has been received and is being reviewed by our support staff.
Please be aware that requests are prioritised and actioned in order – if your request is urgent and you are unable to work, please call the Service Desk directly on 0800 95 95 98

Stephanie Lister (ITSD - Terra Cat)

29/11/2021, 16:02 NZDT

||

[REDACTED]

To add additional comments, reply to this email.

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Georgia Duncan November 30, 2021 at 11:02 AM

Hiya,

Do you need me to call back to discuss this further?

Georgia Duncan
Service Advisor - Terra Cat
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E: Georgia.Duncan@terracat.co.nz | **W:** terracat.co.nz |  



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Georgia Duncan December 6, 2021 at 12:11 PM

Hi there,

I haven't heard anything back about this. Please advise?

Thanks,

Georgia Duncan
Service Advisor - Terra Cat
DDI: +6436681224

E: Georgia.Duncan@terracat.co.nz | **W:** terracat.co.nz |  





From: Georgia Duncan
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Georgia Duncan December 7, 2021 at 12:07 PM

Hi there,

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We would just like some sort of an update as it has been over a week without even knowing if you have enough information. As you will see, the original call cut out when Stephanie logged in to my computer – I don't know if she got enough information when doing this or not as she was only in there for a few seconds. The call then cut off and I have heard nothing since.

Thanks.

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Sent: Monday, 6 December 2021 12:11 pm
To: IT Service Desk <ServiceDesk@terracat.co.nz>
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Stephanie Lister (ITSD - Terra Cat)

|| 29/11/2021, 16:02 NZDT



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Jess Beattie December 14, 2021 at 8:08 AM

Internal note

Hey Steph,

Do you remember what the issue with this one was exactly? Simon Perks has sent in a ticket regarding this and is wanting it to be fixed <https://itsdterracat.zendesk.com/agent/tickets/327913>

Jess Beattie December 14, 2021 at 10:24 AM

Hey Georgia,

Apologies for the delay on this, could you please explain in as much detail as possible what the issue is exactly, something to do with chargeable items showing incorrectly or missing?

Kind regards,
Jess Beattie









Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Georgia Duncan December 14, 2021 at 10:32 AM

Hey Jess,

Yes for some reason the actual charges aren't pulling through.

There are actuals on there as below:

Part transactions  	
Estimate:	388.89
Flat rate:	365.86
Actual:	388.89
Consumed percentage:	106.29 %
Labour transactions  	
Estimate:	360.00
Flat rate:	345.00
Actual:	360.00
Consumed percentage:	104.35 %
Unposted hours:	00:00
Posted hours:	03:00
Invoiced hours:	00:00
Misc transactions  	
Estimate:	26.74
Flat rate:	24.96
Actual:	26.74
Consumed percentage:	107.13 %
Transaction total  	
Estimate:	775.63
Flat rate:	
Actual:	775.63

But when you do a proforma it looks like this:



67 De Havilland Drive
Bell Block
New Plymouth 4312

151 Kerra Road,
Wiri
Auckland 2104

00 - ESV - Service Contracts
C/- CSA Department
Cat Head Office
hand deliver

Pro forma invoice

Invoice Number PJP00398193
Invoice Proposal Date 29/11/2021
GST Number 10-615-607
Cust Account 5001003
Purchase Order 538LL
Service Call Number SC260665
Make CATERPILLAR
Model 538LL
Serial Number JEY00469
Customer Equip. No.
Meter Reading 2206 Hours
Plate

SC260665-01

Segment PO No. 538LL

Perform - 250 Service Hour Maintenance

Customer complaint: Perform 250 hr service while at machine. A bit early but considering travel just do it.

Cause of failure:

Corrective action: Perform - 250 Service Hour Maintenance and inspection as per CAT Inspect App, cut and inspect filters, dispose of waste oil and filters, process SOS samples, add data to share drive as required, complete SIMS report and backlog report.

Complication of repair: NA

Total Parts on segment	\$365.86
Total Labour on segment	\$345.00
Total Misc. on segment	\$24.96

SC260665-01 Total:	\$735.82
--------------------	----------

	Parts	Labour	Misc.	Total
SC260665-01	\$365.86	\$345.00	\$24.96	\$735.82

Segment Totals

Net Sub Total	\$735.82
GST	\$0.00
Total NZD	-\$39.81

One of my team said that this is due to the non-chargeable items pulling through and not everything else?

Feel free to give me a call and I can explain a bit more if necessary!

I just can't do anything with it as it won't let me reopen the segment properly to try do it again. I did credit it but the reopen button is grey'd out.

Georgia Duncan
Service Advisor - Terra Cat
DDI: +6436681224

E: Georgia.Duncan@terraecat.co.nz | W: terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <itsd@terraecat.co.nz>

Sent: Tuesday, 14 December 2021 10:25 am

To: Georgia Duncan <Georgia.Duncan@terraecat.co.nz>

Cc: IT Service Desk <ServiceDesk@terraecat.co.nz>; Simon Perks <Simon.Perks@terraecat.co.nz>; Angie MacDonald <Angie.MacDonald@terraecat.co.nz>; Helen Reade <Helen.Reade@terraecat.co.nz>

Subject: [IT Service Desk] Re: Service Call - invoice incorrect chargeable items missing SC260665

Your request (327246) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

14/12/2021, 10:24 NZDT

Hey Georgia,

Apologies for the delay on this, could you please explain in as much detail as possible what the issue is exactly, something to do with chargeable items showing incorrectly or missing?

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terracat.co.nz

Georgia Duncan

7/12/2021, 12:07 NZDT

Hi there,

I have had no response about this since the call was cut off. Can you please at least advise if you are working on this and need more time?

We would just like some sort of an update as it has been over a week without even knowing if you have enough information. As you will see, the original call cut out when Stephanie logged in to my computer – I don't know if she got enough information when doing this or not as she was only in there for a few seconds. The call then cut off and I have heard nothing since.

Thanks.

Georgia Duncan

Service Advisor - Terra Cat

DDI: +6436681224

E: Georgia.Duncan@terraecat.co.nz **W:** terraecat.co.nz |  

From: Georgia Duncan

Sent: Monday, 6 December 2021 12:11 pm

To: IT Service Desk <ServiceDesk@terraecat.co.nz>

Subject: RE: 327246 [Request Received] Service Call - invoice incorrect chargeable items missing SC260665

Hi there,

I haven't heard anything back about this. Please advise?

Thanks,

Georgia Duncan

Service Advisor - Terra Cat

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E: Georgia.Duncan@terraecat.co.nz **W:** terraecat.co.nz |  

From: Georgia Duncan

Sent: Tuesday, 30 November 2021 11:02 am



To: IT Service Desk <ServiceDesk@terraecat.co.nz>

Subject: RE: 327246 [Request Received] Service Call - invoice incorrect chargeable items missing SC260665

Hiya,

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E: Georgia.Duncan@terracat.co.nz **|W:** terracat.co.nz |  

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Sent: Monday, 29 November 2021 4:04 pm
To: IT Service Desk <ServiceDesk@terracat.co.nz>
Subject: RE: 327246 [Request Received] Service Call - invoice incorrect chargeable items missing SC260665

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29/11/2021, 16:02 NZDT

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30/11/2021, 11:02 NZDT

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E: Georgia.Duncan@terraecat.co.nz **|W:** terraecat.co.nz

Jess Beattie December 14, 2021 at 10:52 AM

Internal note

Hey Sue,
Could you please help with this, why would the actuals not pull through to the proforma?
Georgia is right in that you cannot reopen the segment anymore and there are already 2 invoices that have been invoiced

GGNZ

Invoice proposal

Edit in grid, Delete, Post, Enter PO number, Update Po number, Posted GST, Payment schedule, Totals, Zero price invoice, Print pro forma, Refresh, Export to Microsoft Excel, Attachments, Print management

urites, favourites, bank reconciliation, deposit slips, EMR, ims ticket, setting up users, security, transfer orders, signing limits, inventory breakdown, sales basket, customers, service calls

Invoice proposals

Invoice account	Project ID	Project contract ID	Invoice proposal	Project contract ID	Funding source	Sales currency	Invoice date	Tax Invoice	Status
5001003	SC260665	5001003	PJP00398193	5001003	00 - ESV - Service	NZD	29/11/2021	PC00012111	Invoiced
5001003	SC260665	5001003	PJP00398207	5001003	00 - ESV - Service	NZD	29/11/2021	PI00276010	Invoiced

Jess Beattie
Service Desk Analyst - Terra Cat
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Sent: Tuesday, 14 December 2021 10:32 am
Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>
Subject: Service Call - invoice incorrect chargeable items missing SC260665









You are a follower on this request (327246). Reply to this email to add an internal note to the request.

Georgia Duncan
14 Dec 2021, 10:32 GMT+13

Hey Jess,

Yes for some reason the actual charges aren't pulling through.

There are actuals on there as below:

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Actual:	775.63

But when you do a proforma it looks like this:



67 De Havilland Drive
Bell Block
New Plymouth 4312

151 Kerra Road,
Wiri
Auckland 2104

00 - ESV - Service Contracts
C/- CSA Department
Cat Head Office
hand deliver

Pro forma invoice

Invoice Number P3P00398193
Invoice Proposal Date 29/11/2021
GST Number 10-615-607
Cust Account 5001003
Purchase Order 538LL
Service Call Number SC260665
Make CATERPILLAR
Model 538LL
Serial Number JEY00469
Customer Equip. No.
Meter Reading 2206 Hours
Plate

SC260665-01

Segment PO No. 538LL

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Sent: Tuesday, 14 December 2021 10:25 am
To: Georgia Duncan <Georgia.Duncan@terraecat.co.nz>
Cc: IT Service Desk <ServiceDesk@terraecat.co.nz>; Simon Perks <Simon.Perks@terraecat.co.nz>;
Angie MacDonald <Angie.MacDonald@terraecat.co.nz>; Helen Reade <Helen.Reade@terraecat.co.nz>
Subject: [IT Service Desk] Re: Service Call - invoice incorrect chargeable items missing SC260665

Your request (327246) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

14/12/2021, 10:24 NZDT

Hey Georgia,

Apologies for the delay on this, could you please explain in as much detail as possible what the issue is exactly, something to do with chargeable items showing incorrectly or missing?

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Georgia Duncan

7/12/2021, 12:07 NZDT

Hi there,

I have had no response about this since the call was cut off. Can you please at least advise if you are working on this and need more time?

We would just like some sort of an update as it has been over a week without even knowing if you have enough information. As you will see, the original call cut out when Stephanie logged in to my computer – I don't know if she got enough information when doing this or not as she was only in there for a few seconds. The call then cut off and I have heard nothing since.

Thanks.

Georgia Duncan

Service Advisor - Terra Cat

DDI: +6436681224

E: Georgia.Duncan@terracat.co.nz **W:** terracat.co.nz | ☐ ☐

From: Georgia Duncan

Sent: Monday, 6 December 2021 12:11 pm

To: IT Service Desk <ServiceDesk@terracat.co.nz>

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Hi there,

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Service Advisor - Terra Cat

DDI: +6436681224

E: Georgia.Duncan@terracat.co.nz **W:** terracat.co.nz | ☐ ☐

From: Georgia Duncan

Sent: Tuesday, 30 November 2021 11:02 am

To: IT Service Desk <ServiceDesk@terracat.co.nz>

Subject: RE: 327246 [Request Received] Service Call - invoice incorrect chargeable items missing SC260665

Hiya,

Do you need me to call back to discuss this further?

Georgia Duncan
Service Advisor - Terra Cat
DDI: +6436681224

E: Georgia.Duncan@terracat.co.nz | **W:** terracat.co.nz |  

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Stephanie Lister (ITSD - Terra Cat)

29/11/2021, 16:02 NZDT

|

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[3LXM3Z-WLPL]

This email and any attachment...

Jess Beattie December 14, 2021 at 11:18 AM

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Kind regards,
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24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

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Hi jess,

No, sorry – the proforma has a negative balance at the bottom. Something has gone wrong and it states the flat rates but isn't pulling the correct chargeable items through:



67 De Havilland Drive
Bell Block
New Plymouth 4312

151 Kers Road,
Wai
Auckland 2104

Pro forma invoice

Invoice Number PJP00398193
Invoice Proposal Date 29/11/2021
GST Number 10-615-607
Cust Account 5001003
Purchase Order 538LL
Service Call Number SC260665
Make CATERPILLAR
Model 538LL
Serial Number JEY00469
Customer Equip. No.
Meter Reading 2206 Hours
Plate

00 - ESV - Service Contracts
c/- CSA Department
Cat Head Office
hand deliver

SC260665-01

Segment PO No. 538LL

Perform - 250 Service Hour Maintenance

Customer complaint: Perform 250 hr service while at machine. A bit early but considering travel just do it.

Cause of failure:

Corrective action: Perform - 250 Service Hour Maintenance and inspection as per CAT Inspect App, cut and inspect filters, dispose of waste oil and filters, process SOS samples, add data to share drive as required, complete SIMS report and backlog report.

Complication of repair: NA

Total Parts on segment	\$365.86
Total Labour on segment	\$345.00
Total Misc. on segment	\$24.96

SC260665-01 Total:	\$735.82
--------------------	----------

	Parts	Labour	Misc.	Total
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Segment Totals

Net Sub Total	\$735.82
GST	\$0.00
Total NZD	-\$39.81

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|| 14/12/2021, 10:32 NZDT

Hey Jess,

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There are actuals on there as below:

[REDACTED]

But when you do a proforma it looks like this:

One of my team said that this is due to the non-chargeable items pulling through and not everything else?

Feel free to give me a call and I can explain a bit more if necessary!

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29/11/2021, 16:02 NZDT

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E: Georgia.Duncan@terraecat.co.nz | **W:** terraecat.co.nz | 

Georgia Duncan December 14, 2021 at 11:26 AM

One of my team thinks the issue is here:

Segment transactions (4 - ggnz) - Call number: SC260665, Newton Harvesting Ltd

File Transaction details Service report Service call closing sum...

Filter

Include subprojects: ☒ Show adjustments: ☒

Overview

Call number	Segment id	Project ID	Project name	Customer account	Name	Project stage
SC260665		SC260665	Perform - 250 Service Hour Maintenance	5001003	00 - ESV - Service Contracts	In progress
SC260665	SC260665-01	SC260665-01	Perform - 250 Service Hour Maintenance	5001003	00 - ESV - Service Contracts	In progress

Overview

Transaction type	Item number	Project date	Project ID	Line category group	Category	Quantity	Sales price	Sales amount	Sales currency	Line property	Invoice status	Name	Worker	Company - Sales price	Company - Sales amount
Labour		24/11/2021	SC260665-01	SITE	LBR-FLD-REV-FR	3.00	120.00	360.00	NZD	SC-SS	Chargeable		Mark Pollard	120.00	360.00
Misc		29/11/2021	SC260665-01	WOD	MSC-WOD-REV-TM	25.00	0.20	5.00	NZD	CHARGEABLE	Chargeable			0.20	5.00
Misc		29/11/2021	SC260665-01	MOL	MSC-MOL-REV-TM	0.50	20.48	10.24	NZD	CHARGEABLE	Chargeable			20.48	10.24
Misc		29/11/2021	SC260665-01	WFD	MSC-WFD-REV-TM	2.00	2.00	4.00	NZD	CHARGEABLE	Chargeable			2.00	4.00
Misc		29/11/2021	SC260665-01	WSS	MSC-WSS-REV-TM	5.00	1.50	7.50	NZD	CHARGEABLE	Chargeable			1.50	7.50
Misc		29/11/2021	SC260665-01	FRVP	FEE-FRV-PTS-REV	1.00	-23.03	-23.03	NZD	CHARGEABLE	Non-chargeable			-23.03	-23.03
Misc		29/11/2021	SC260665-01	FRVL	FEE-FRV-LAB-REV	1.00	-15.00	-15.00	NZD	CHARGEABLE	Non-chargeable			-15.00	-15.00
Misc		29/11/2021	SC260665-01	FRVM	FEE-FRV-MSC-REV	1.00	-1.78	-1.78	NZD	CHARGEABLE	Non-chargeable			-1.78	-1.78
Misc		29/11/2021	SC260665-01	FRVP	FEE-FRV-PTS-REV	1.00	23.03	23.03	NZD	CHARGEABLE	Non-chargeable			23.03	23.03
Misc		29/11/2021	SC260665-01	FRVL	FEE-FRV-LAB-REV	1.00	15.00	15.00	NZD	CHARGEABLE	Non-chargeable			15.00	15.00
Misc		29/11/2021	SC260665-01	FRVM	FEE-FRV-MSC-REV	1.00	1.78	1.78	NZD	CHARGEABLE	Non-chargeable			1.78	1.78

She said these are usually background charges and something about revenue and they seem to be the only thing that has pulled through onto the invoice.

Georgia Duncan
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DDI: +6436681224

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From: Georgia Duncan
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Subject: RE: [IT Service Desk] Ticket Resolved: Service Call - invoice incorrect chargeable items missing SC260665

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Make CATERPILLAR
Model 538LL
Serial Number JEY00469
Customer Equip. No.
Meter Reading 2206 Hours
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Cat Head Office
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SC260665-01

Segment PO No. 538LL

Perform - 250 Service Hour Maintenance

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Georgia Duncan



| 6/12/2021, 12:11 NZDT

Hi there,

I haven't heard anything back about this. Please advise?

Thanks,

Georgia Duncan
Service Advisor - Terra Cat
DDI: +6436681224



E: Georgia.Duncan@terracat.co.nz | **W:** terracat.co.nz |  

From: Georgia Duncan
Sent: Tuesday, 30 November 2021 11:02 am
To: IT Service Desk <ServiceDesk@terracat.co.nz>
Subject: RE: 327246 [Request Received] Service Call - invoice incorrect chargeable items missing SC260665

Hiya,

Do you need me to call back to discuss this further?

Georgia Duncan
Service Advisor - Terra Cat
DDI: +6436681224

E: Georgia.Duncan@terracat.co.nz | **W:** terracat.co.nz |  

Jess Beattie December 14, 2021 at 12:07 PM

I have passed this one onto Sue to have a further look, however she does have back-to-back meetings for most of the afternoon but will look at this asap

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Jess Beattie December 14, 2021 at 2:42 PM

Hey Georgia,
Sue has discovered the issue. There was still an open invoice proposal within the projects area in naxt. We have deleted this for you and Sue tested all of this in Sandbox first then created a proforma and it pulled through all the amounts like it should :)

You should be fine now to create a new proforma.

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Jess Beattie December 14, 2021 at 2:43 PM

Internal note

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