



1 June 2022

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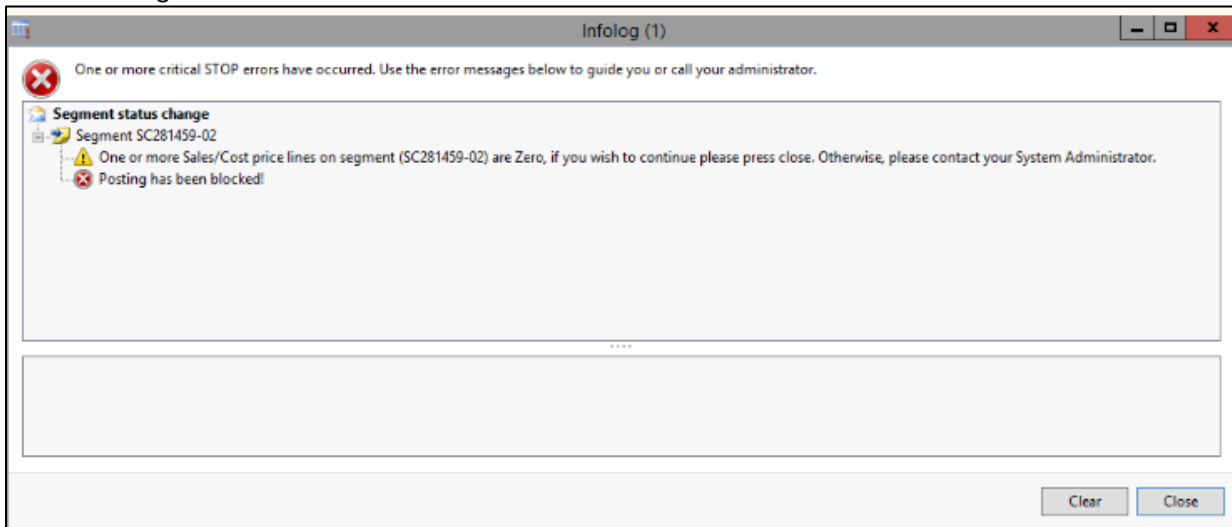
# Zero cost or sales price fix

Transfer all good transactions  
**EXCEPT** the zero line

**Terra Industrial New Zealand Ltd**

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16 Branston Street, Hornby  
Christchurch 8441, New Zealand  
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## Error message

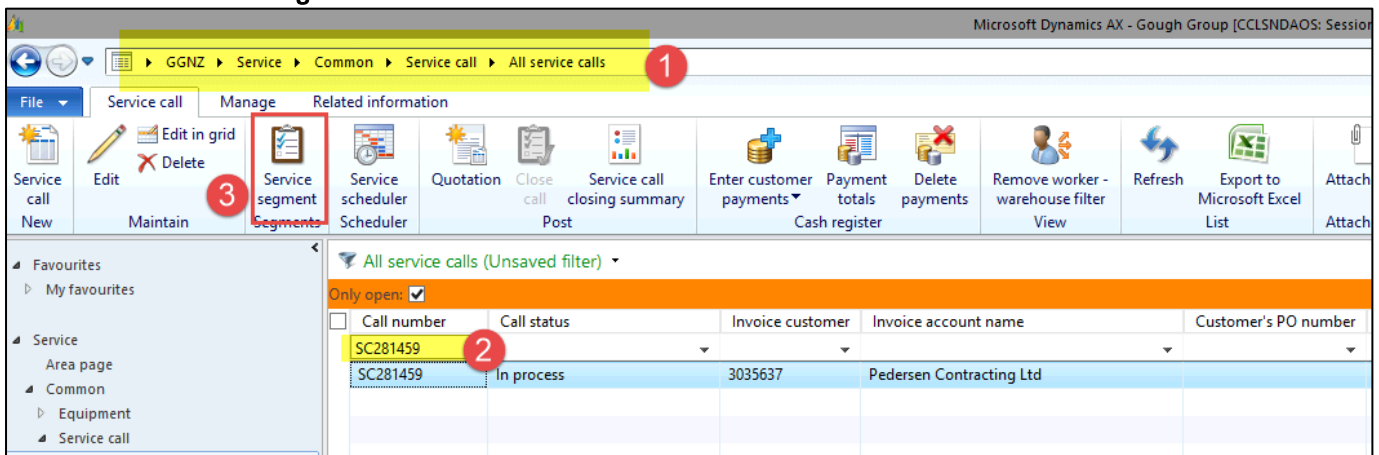


### Fix:

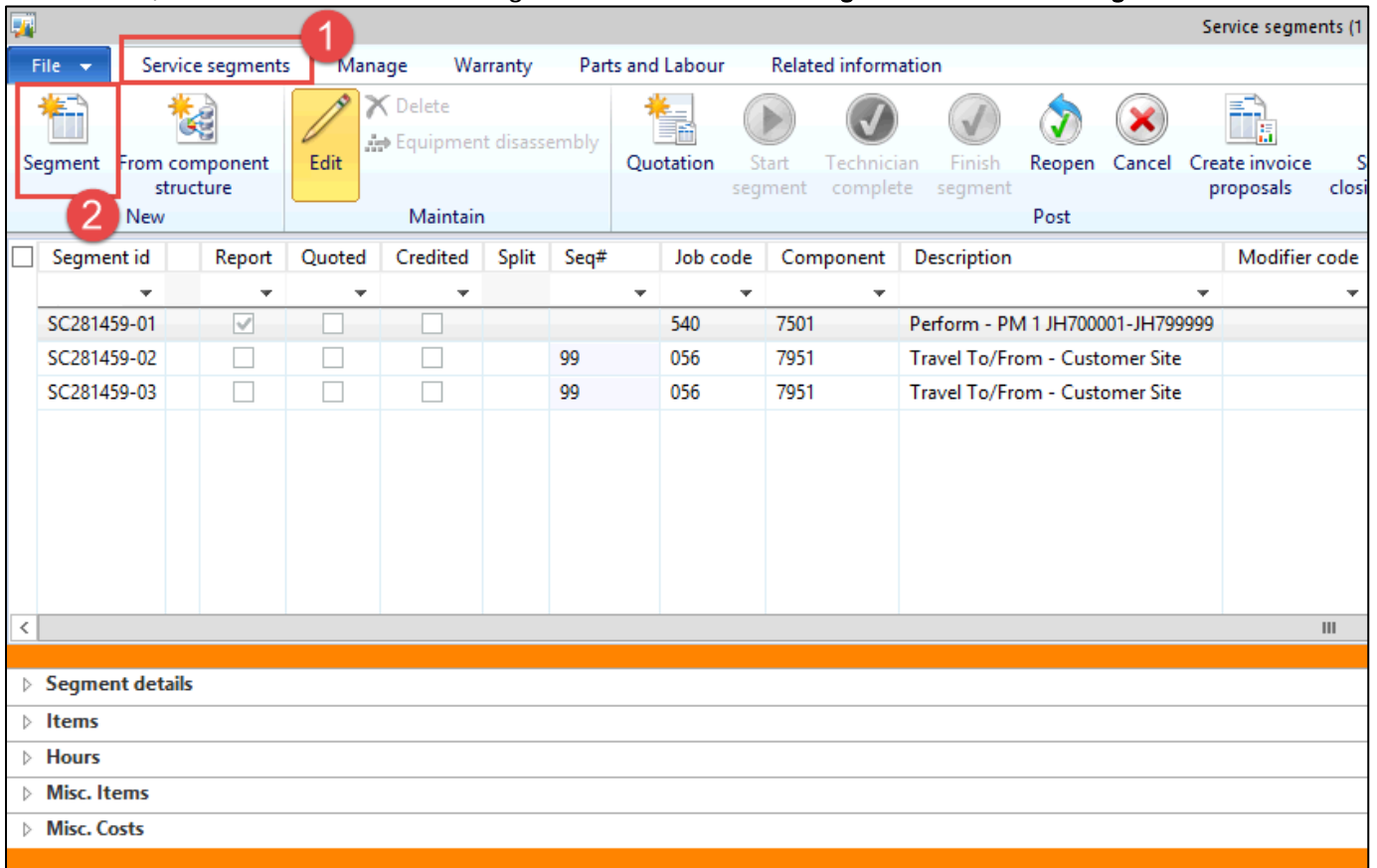
- Create a new segment
- Transfer all transactions from old segment to new segment EXCEPT the line with zero cost/sales price
- Cancel old segment

### Steps on how to implement the fix:

1. GGNZ > Service > Common > Service call > All service calls
2. Filter for the service call number
3. Click **Service segment**

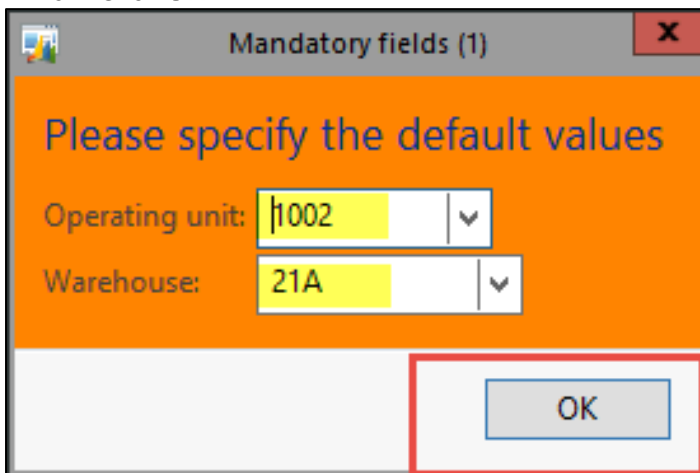


4. First, we need to create a new segment > On the **Service segments** tab > Click **Segment**



Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			540	7501	Perform - PM 1 JH700001-JH799999	
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site	
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site	

5. Put in the correct operating unit and warehouse (The below screenshot is just an example)
6. Click OK



**Mandatory fields (1)**

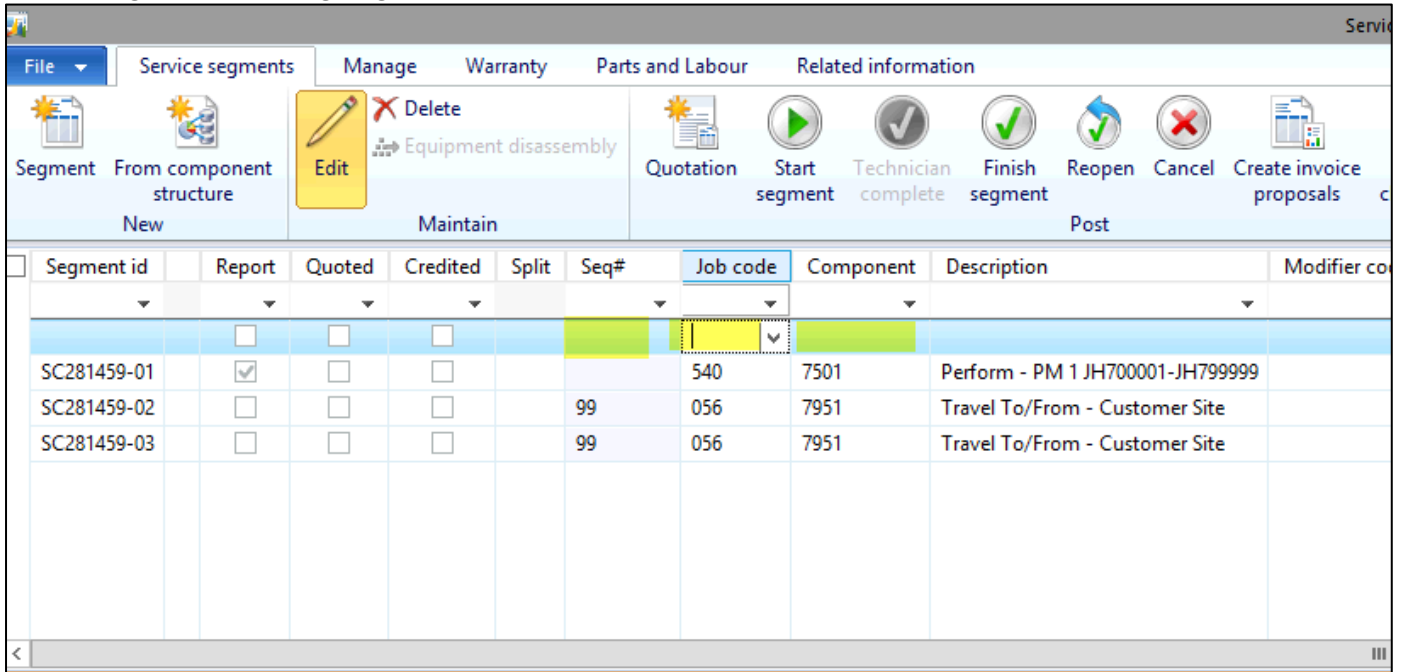
Please specify the default values

Operating unit:

Warehouse:

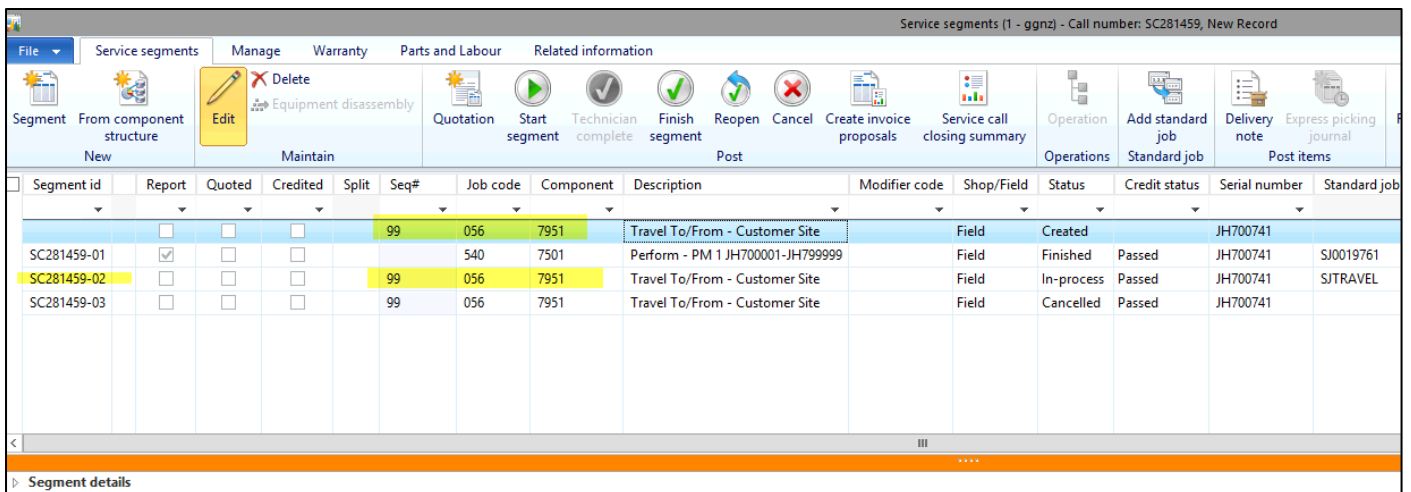
**OK**

7. You will need to enter in the **Seg#, Job code and Component** (this will need to match the segment you are going to transfer from)



Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			540	7501	Perform - PM 1 JH700001-JH799999	
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site	
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site	

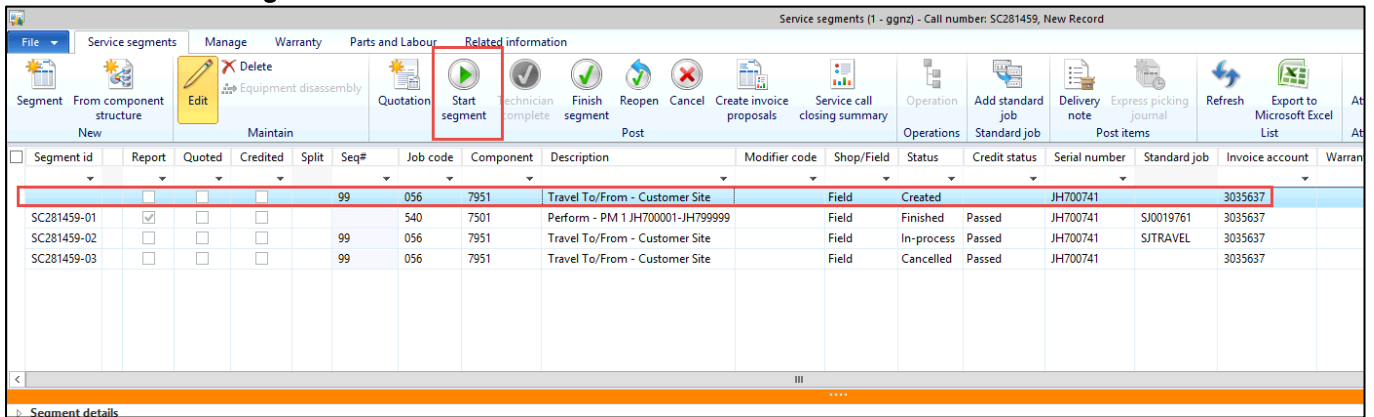
For this instance, the new segment needs to match segment 2 because we are going to be transferring the good transactions from segment 2 to the new segment



Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site		Field	Created		JH700741	
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	SJ0019761
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741	

8. Make sure you have the new segment selected

9. Click **Start segment**



Service segments (1 - ggnz) - Call number: SC281459, New Record

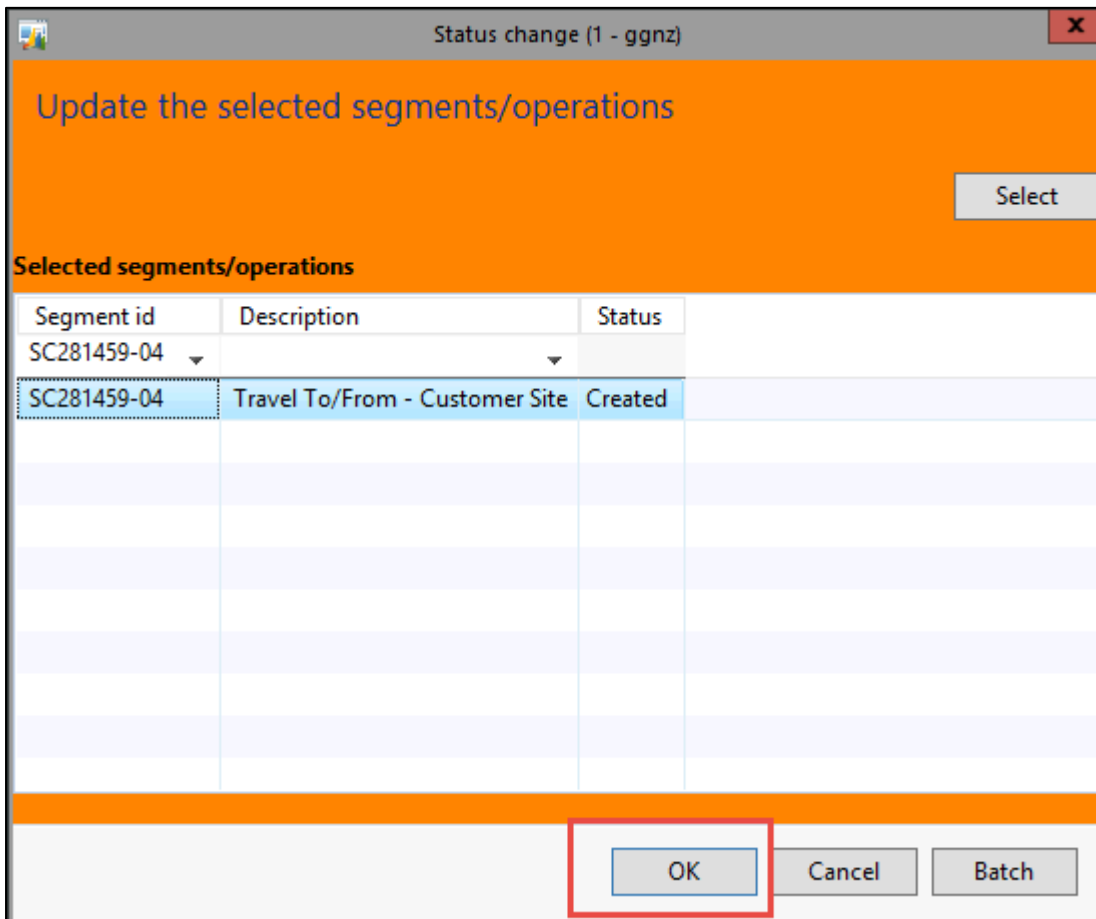
File Service segments Manage Warranty Parts and Labour Related information

Segment From component structure Edit Delete Equipment disassembly Quotation Start segment Technician complete Finish segment Reopen Cancel Create invoice proposals Service call closing summary Operation Add standard job Standard job Delivery note Express picking journal Refresh Export to Microsoft Excel List At

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warrant
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Created		JH700741		3035637	
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	SJTRAVEL	3035637	
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741		3035637	

Segment details

10. Click **OK**



Status change (1 - ggnz)

Update the selected segments/operations

Select

Selected segments/operations

Segment id	Description	Status
SC281459-04	Travel To/From - Customer Site	Created

OK Cancel Batch



13. Tick the box next to the "old" segment (in this instance, it is segment 2)
14. Click **Service call closing summary** at the top

Service segments (1 - ggnz) - Segment id: SC281459-02, In-process, Call number: SC281459

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type	Last
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ0019761	3035637		18/0
SC281459-02	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	SJTRAVEL	3035637		18/0
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741		3035637		
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741		3035637		

Segment details ★

Items

Hours

Misc. Items

15. Do not worry if this error pops up again, we are about to deal with it > click **Close**

Service call closing summary (1 - ggnz) - Segment id: SC281459-02, In-process, Call number: SC281459

Step 1 - Service call closing summary

Overview Financial dimension

Call number	Segment id	Line status	Project ID	Project name	Customer account	Name	Customer category group	Customer's PO number	Make	Model
SC281459		In process	SC281459	Perform - 250 Hour service maintenance	3035637	Pedersen Contracting Ltd	REVENUE		CATERPILLAR	301.7
SC281459	SC281459-02	In-process	SC281459-02	Travel To/From - Customer Site	3035637	Pedersen Contracting Ltd	REVENUE		CATERPILLAR	301.7

Overview

Project ID	Transaction type	Item number	Description	Line category group
SC281459*				
SC281459-02	Labour		TRAVEL	
SC281459-02	Misc		Vehicle Km	KM1

Infolog (1)

One or more critical STOP errors have occurred. Use the error messages below to guide you or call your administrator.

**Segment status change**

Segment SC281459-02

One or more Sales/Cost price lines on segment (SC281459-02) are Zero, if you wish to continue please contact your administrator.

Posting has been blocked!

Clear Close

16. Tick the box next to the segment line that corresponds to the correct segment number (segment 2 for this example)
17. Also take note of what is in the below half of the closing summary screen, if there is a **Misc** line such as a KM1 (highlighted below) – this will need to be removed from the segment and put onto the new segment – we will come back to that after we have done the transfer.

Service call closing summary (1 - ggnz) - Segment id: SC281459-02, In-process, Call number: SC281459

Step 1 – Service call closing summary

Overview Financial dimension

Details Warranty coverage Contracts Totals Adjust **Transfer** Quotations

Call number	Segment id	Line status	Project ID	Project name	Customer account	Name	Customer category group	Customer's PO number	Make	Model	Serial number
SC281459	In process	SC281459	Perform - 250 Hour service maintenance	3035637	Pedersen Contracting Ltd	REVENUE			CATERPILLAR	301.7	JH700741
<input checked="" type="checkbox"/>	SC281459-02	In-process	SC281459-02	Travel To/From - Customer Site	3035637	Pedersen Contracting Ltd	REVENUE		CATERPILLAR	301.7	JH700741

Overview

Project ID	Transaction type	Item number	Description	Line category group	Estimated Quantity	Quotation quantity	Actual quantity	Estimated amount	Quotation amount	Actual amount	Quotation flat rate	Flat rate	Sales currency
SC281459-02	Labour		TRAVEL		1.00	0.00	0.25	105.00	0.00	26.25			NZD
SC281459-02	Misc		Vehicle Km	KM1	6.00	0.00	0.00	9.00	0.00	0.00			NZD

## 18. Click Select

Transfer project transactions (1 - ggnz)

File **Select** Transfer

Overview General Cost Sales Financial dimensions

Transaction type	Project date	Project ID	Quantity	Cost price	Sales price	Sales currency	Line property	Line category group	Category	Item	Description	Worker
This grid is empty.												

Update Post

Overview General Cost Sales Financial dimensions

Transaction type	Project date	Project ID	Quantity	Cost price	Sales price	Sales currency	Line property	Line category group	Category	Item	Description	Worker
This grid is empty.												

Select lines to be adjusted.

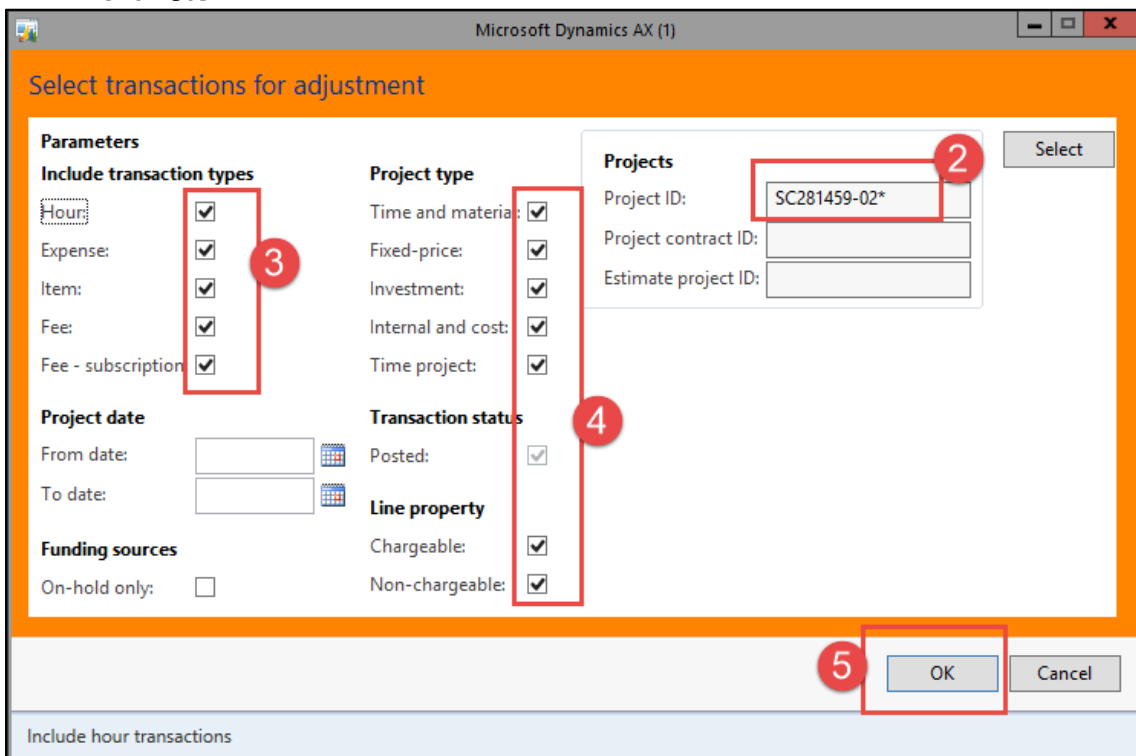
(64) NZD ggnz Close



19. Make sure that the **Project ID** shows the correct segment number that you are transferring from.

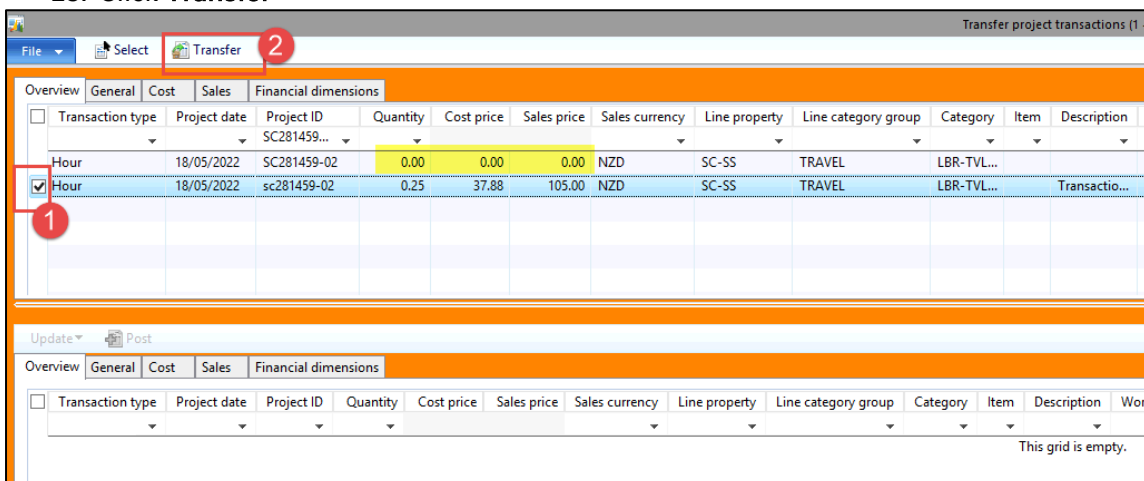
20. All boxes need to be ticked

21. Click **OK**



22. You will see all the transactions on that segment including the one that has no cost/sales price. We need to leave that one behind, so **ONLY** tick the one that shows the pricing

23. Click **Transfer**

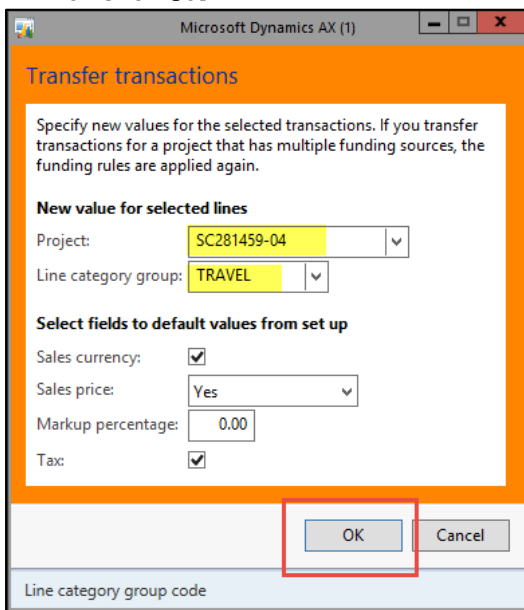


Transaction type	Project date	Project ID	Quantity	Cost price	Sales price	Sales currency	Line property	Line category group	Category	Item	Description
Hour	18/05/2022	SC281459-02	0.00	0.00	0.00	NZD	SC-SS	TRAVEL	LBR-TVL...		
Hour	18/05/2022	sc281459-02	0.25	37.88	105.00	NZD	SC-SS	TRAVEL	LBR-TVL...	Transaction...	

24. In the **Transfer transactions** box, enter in the new segment number (for this example, it is segment 4)

25. Enter in the **Line category group**

26. Click **OK**



Microsoft Dynamics AX (1)

**Transfer transactions**

Specify new values for the selected transactions. If you transfer transactions for a project that has multiple funding sources, the funding rules are applied again.

**New value for selected lines**

Project: SC281459-04

Line category group: TRAVEL

**Select fields to default values from set up**

Sales currency: ☒

Sales price: Yes

Markup percentage: 0.00

Tax: ☒

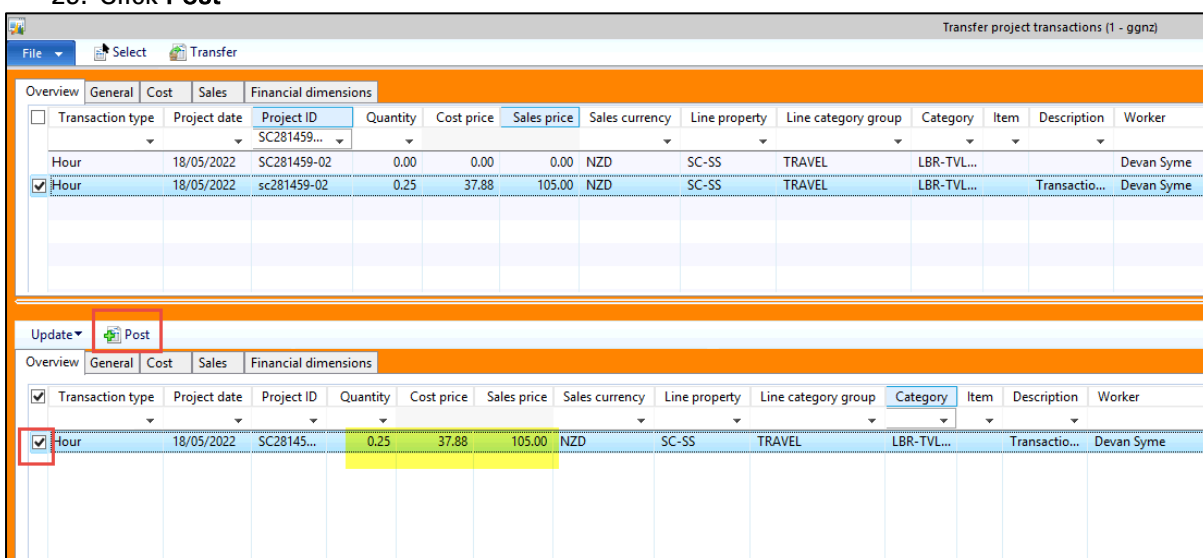
OK Cancel

Line category group code

27. The transaction/s you are transferring, will now show up in the second half of the transfer window, ready to post.

28. Make sure that there is a cost and sales price showing > if there is, then tick the box next to the line

29. Click **Post**



Transfer project transactions (1 - ggnz)

File Select Transfer

Overview General Cost Sales Financial dimensions

Transaction type	Project date	Project ID	Quantity	Cost price	Sales price	Sales currency	Line property	Line category group	Category	Item	Description	Worker
Hour	18/05/2022	SC281459-02	0.00	0.00	0.00	NZD	SC-SS	TRAVEL	LBR-TVL...			Devan Syme
<input checked="" type="checkbox"/> Hour	18/05/2022	sc281459-02	0.25	37.88	105.00	NZD	SC-SS	TRAVEL	LBR-TVL...		Transactio...	Devan Syme

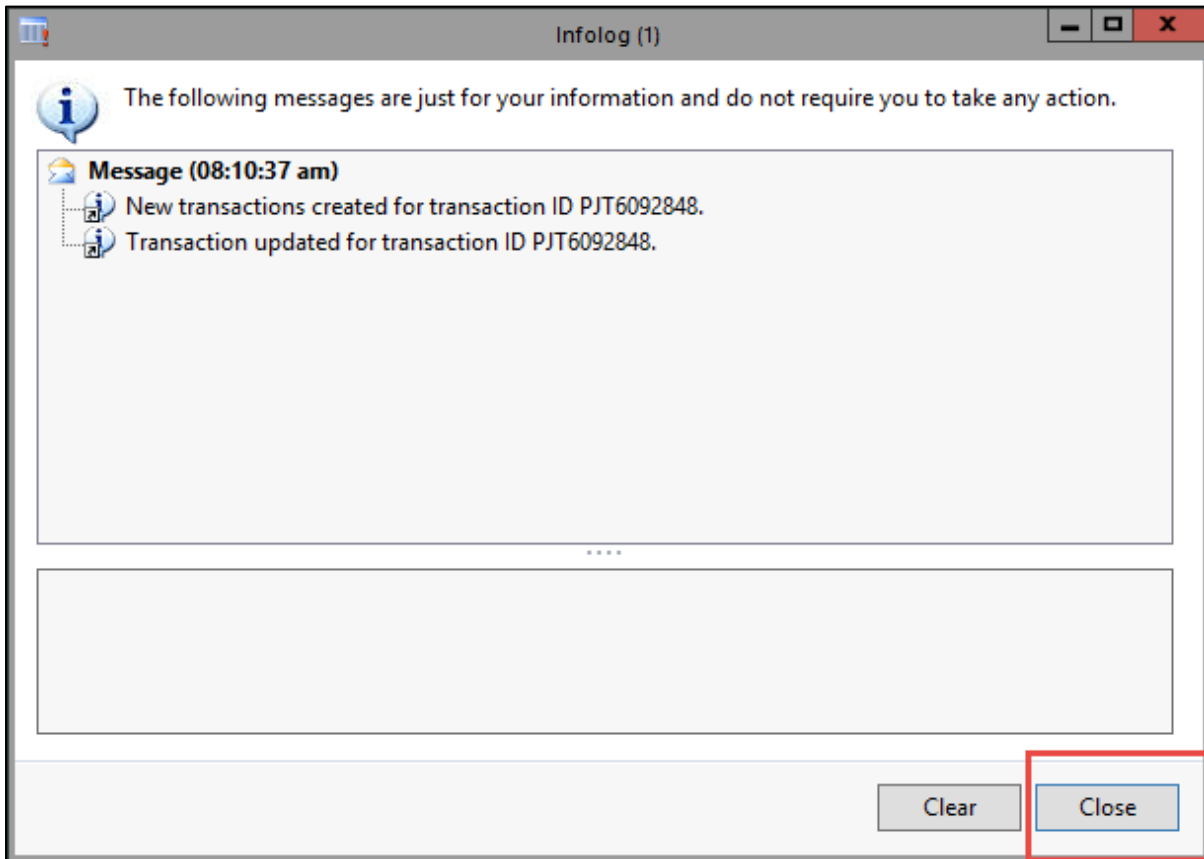
Update Post

Overview General Cost Sales Financial dimensions

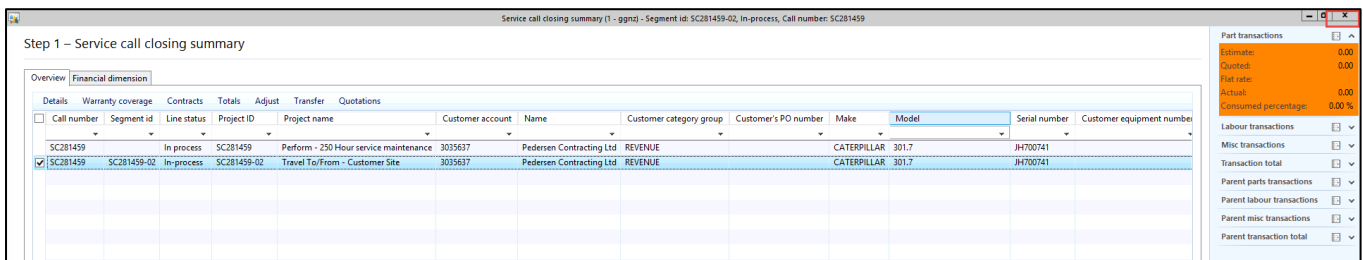
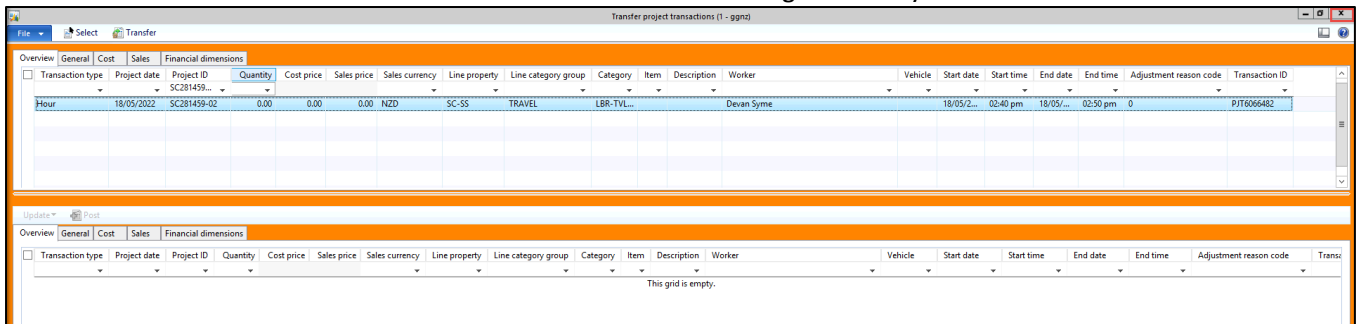
Transaction type	Project date	Project ID	Quantity	Cost price	Sales price	Sales currency	Line property	Line category group	Category	Item	Description	Worker
<input checked="" type="checkbox"/> Hour	18/05/2022	SC28145...	0.25	37.88	105.00	NZD	SC-SS	TRAVEL	LBR-TVL...		Transactio...	Devan Syme

30. You should then see this screen essentially telling you that the transfer was successful

31. Click **Close**



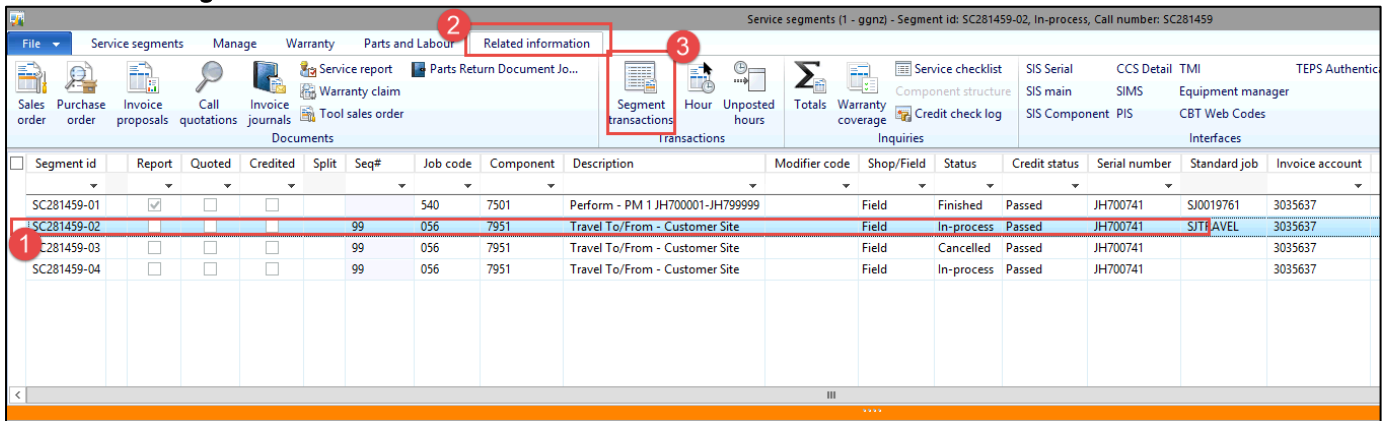
32. You can now close the transfer window and the closing summary window



33. If you want to double check that the process has been done correctly, select the old segment

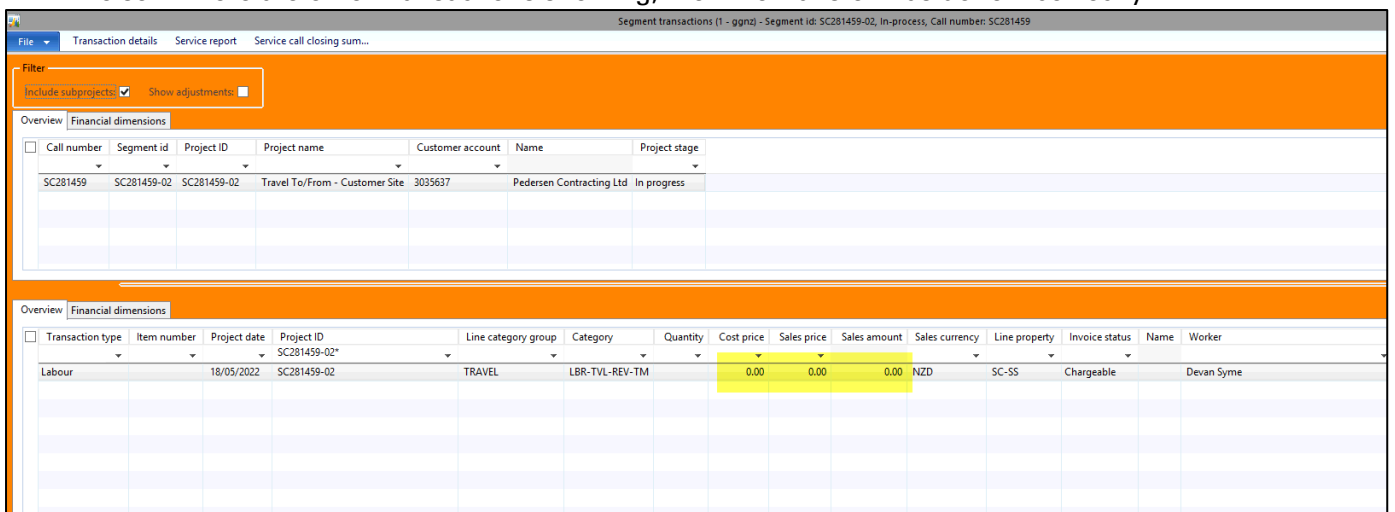
34. Related info tab at the top

35. Click **Segment transactions**



Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ0019761	3035637
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	SJT019761	3035637
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741		3035637
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741		3035637

36. There should only be the transaction with the zero cost/sales price showing and nothing else. If there are other transactions showing, then the transfer was done incorrectly



Call number	Segment id	Project ID	Project name	Customer account	Name	Project stage
SC281459	SC281459-02	SC281459-02	Travel To/From - Customer Site	3035637	Pedersen Contracting Ltd	In progress

Transaction type	Item number	Project date	Project ID	Line category group	Category	Quantity	Cost price	Sales price	Sales amount	Sales currency	Line property	Invoice status	Name	Worker
Labour		18/05/2022	SC281459-02	TRAVEL	LBR-TVL-REV-TM		0.00	0.00	0.00	NZD	SC-SS	Chargeable		Devan Syme

37. Close the transactions window

38. Now select the new segment

39. Related info tab at the top

40. Click **Segment transactions**

Service segments (1 - ggnz) - Segment id: SC281459-04, In-process, Call number: SC281459

File

Service segments

Manage

Warranty

Parts and Labour

Related information

Sales order

Purchase order

Invoice proposals

Call quotations

Invoice journals

Warranty claim

Tool sales order

Segment transactions

Hour

Unposted hours

Totals

Warranty coverage

Component structure

Credit check log

SIS Serial

SIS main

SIS Component

CCS Detail

SIMS

PIS

TMI

Equip

CBT V

Inte

Documents

Transactions

Inquiries

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Star
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ00
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	SJTR
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741	
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	

Segment details

41. All the other transactions from the old segment should be showing on this new segment

Segment transactions (1 - ggnz) - Segment id: SC281459-04, In-process, Call number: SC281459

FileTransaction detailsService reportService call closing sum...

Filter

Include subprojects: ☒ Show adjustments: ☐

OverviewFinancial dimensions

<input type="checkbox"/> Call number	Segment id	Project ID	Project name	Customer account	Name	Project stage
SC281459	SC281459-04	SC281459-04	Travel To/From - Customer Site	3035637	Pedersen Contracting Ltd	In progress

OverviewFinancial dimensions

<input type="checkbox"/> Transaction type	Item number	Project date	Project ID	Line category group	Category	Quantity	Cost price	Sales price	Sales amount	Sales currency	Line property	Invoice status	Name	Worker
Labour		18/05/2022	SC281459-04	TRAVEL	LBR-TVL-REV-TM	0.25	37.88	105.00	26.25	NZD	SC-SS	Chargeable	Devan Syme	

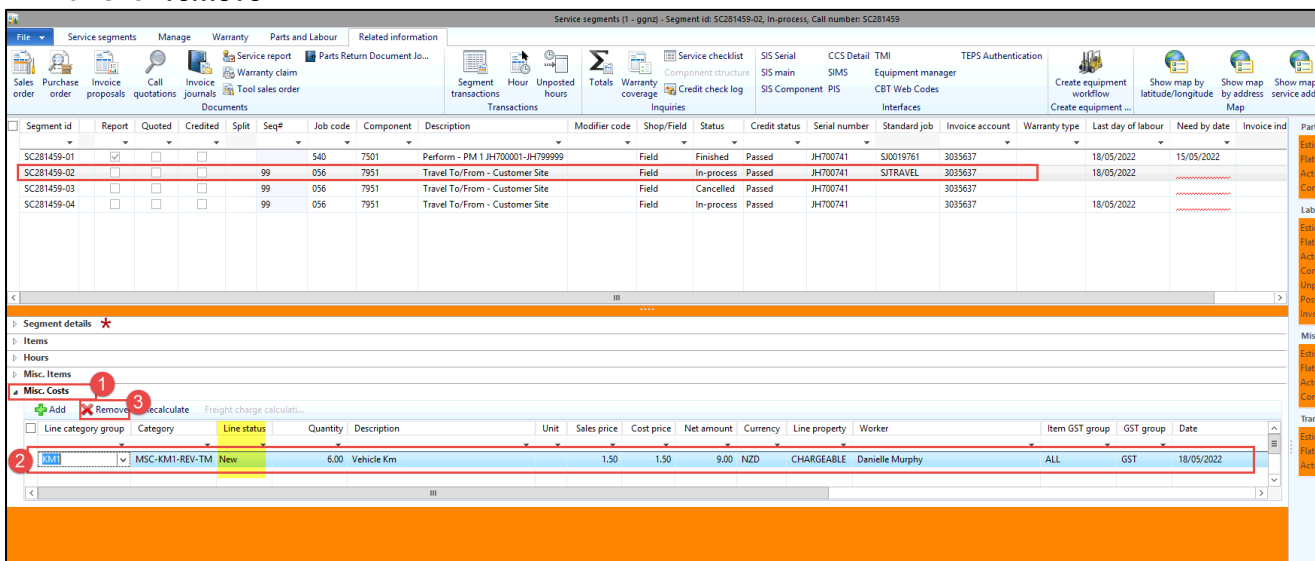
42. Close the transactions window

43. Select the old segment again

44. We need to remove the Misc Cost line (only if the **Line Status** does not say **posted**) > take note of all the details for the line because you will need to add it to the new segment later.

45. Select the Misc cost line

46. Click **remove**

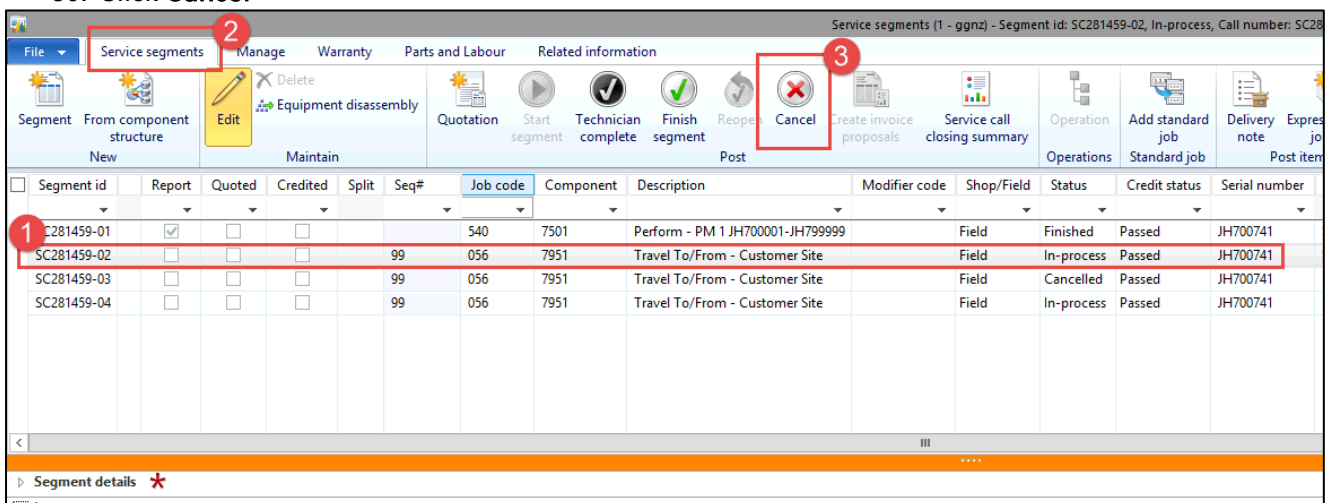


47. You should now be able to cancel the old segment

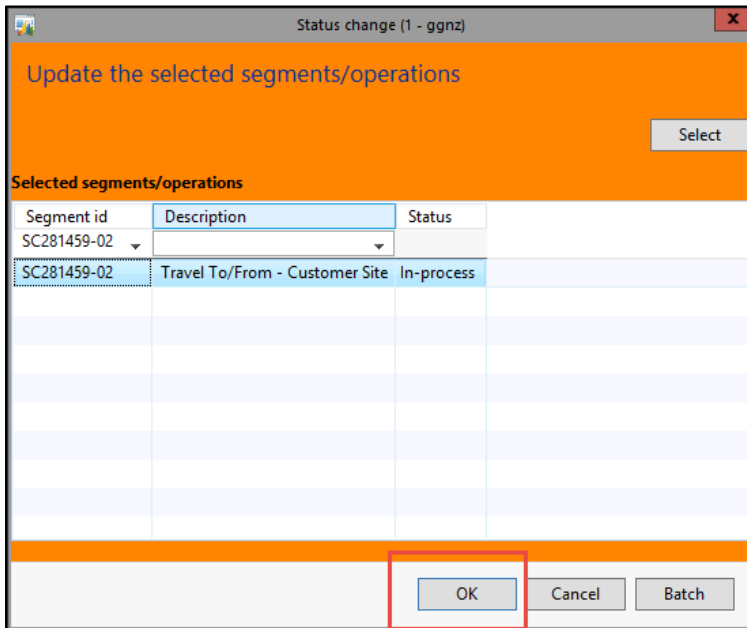
48. Select the old segment

49. Service segments tab

50. Click **Cancel**

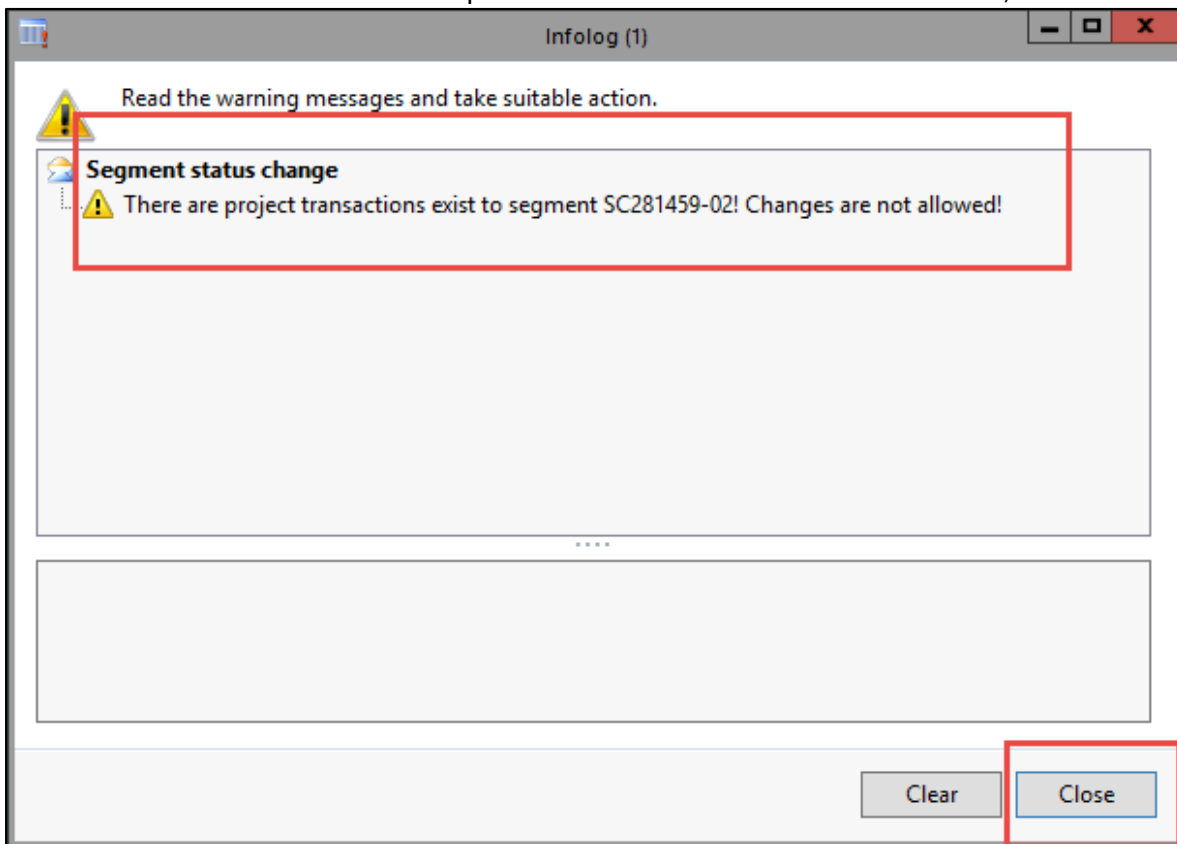


51. Click OK



Segment id	Description	Status
SC281459-02	Travel To/From - Customer Site	In-process

52. If you run into the below error, then you cannot cancel the segment. You will need to change the invoice customer to an internal account then invoice it for zero. (Check with the accountants or service supervisor as to what internal account to use)



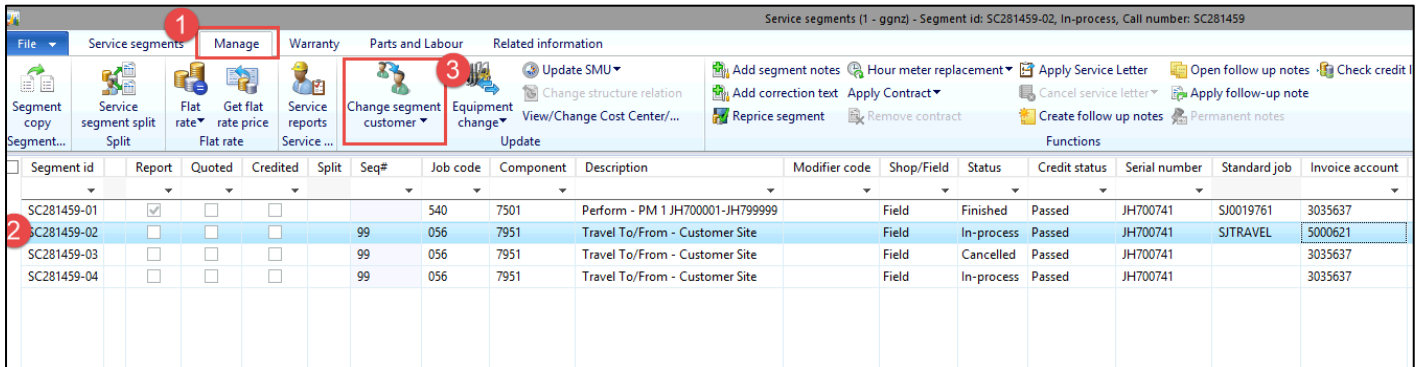
**Segment status change**

There are project transactions exist to segment SC281459-02! Changes are not allowed!

53. Go to the **Manage** tab

54. Click **Change segment customer**

55. Enter in the internal account number > click **OK**

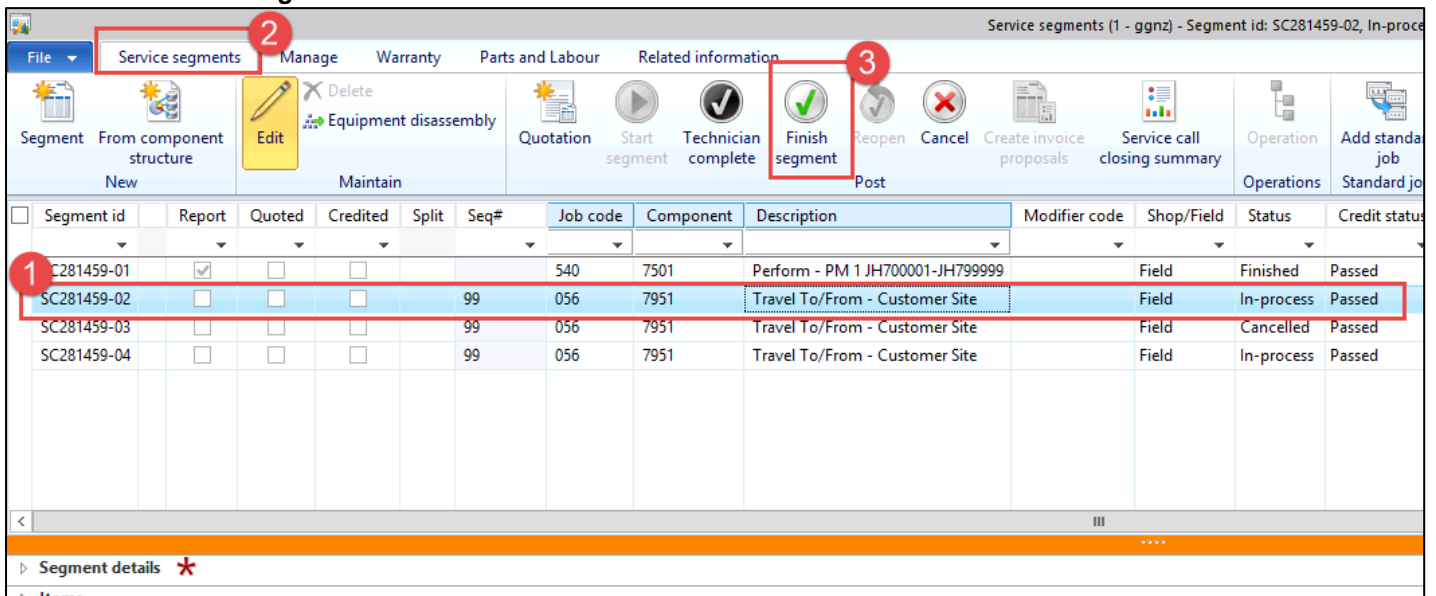


Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ0019761	3035637
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	SJTRAVEL	5000621
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741		3035637
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741		3035637

56. Select the old segment

57. **Service segments** tab

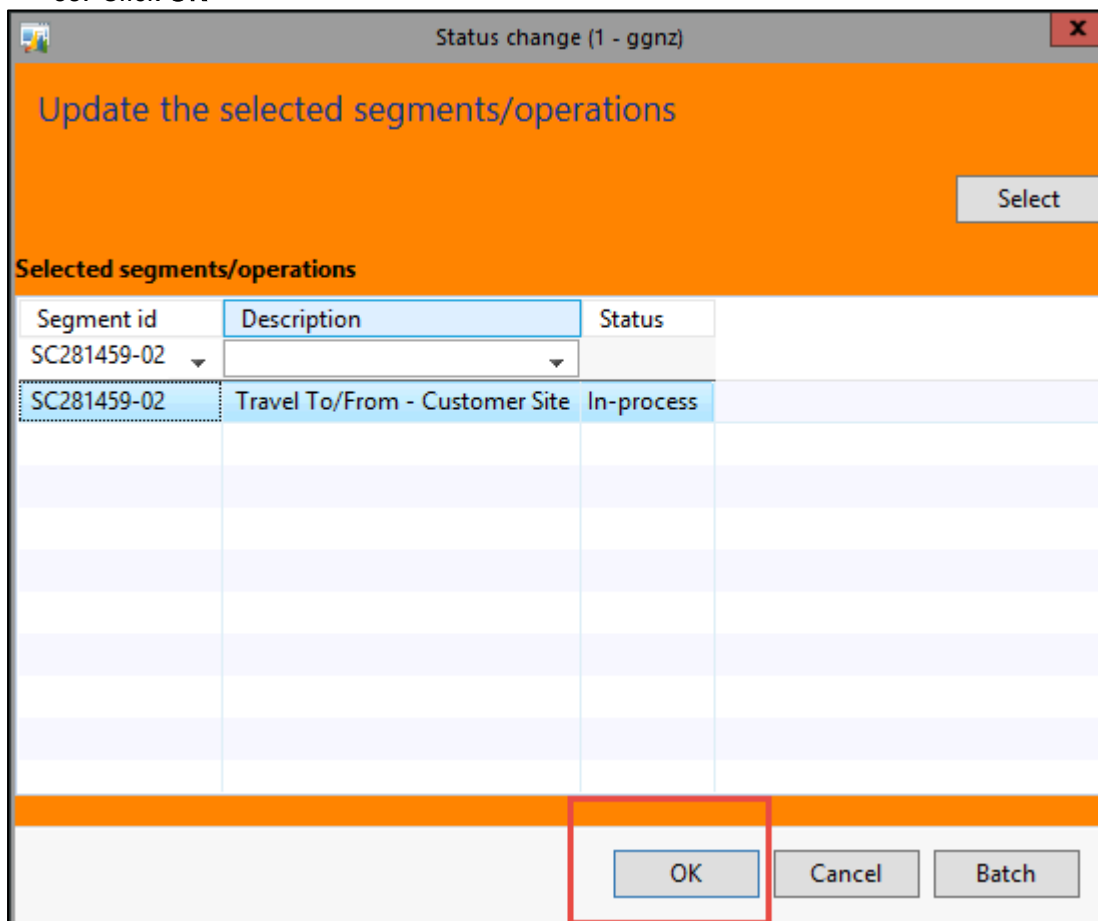
58. Click **Finish segment**



Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed



59. Click OK



**Status change (1 - ggnz)**

Update the selected segments/operations

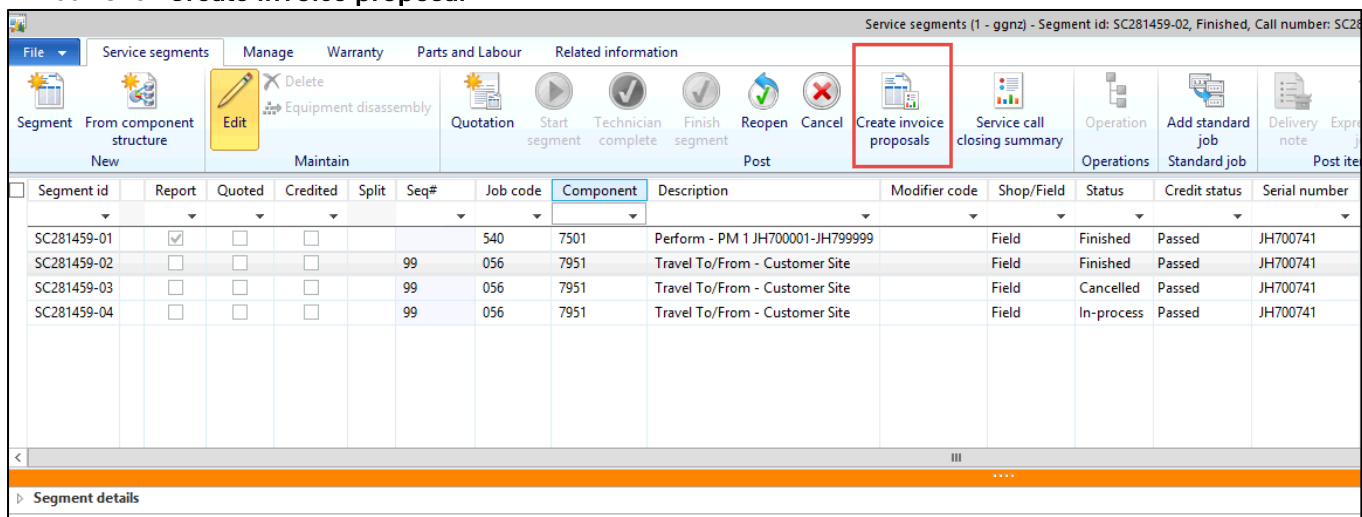
Select

**Selected segments/operations**

Segment id	Description	Status
SC281459-02		
SC281459-02	Travel To/From - Customer Site	In-process

OK Cancel Batch

60. Click **Create invoice proposal**



Service segments (1 - ggnz) - Segment id: SC281459-02, Finished, Call number: SC281459-02

File Service segments Manage Warranty Parts and Labour Related information

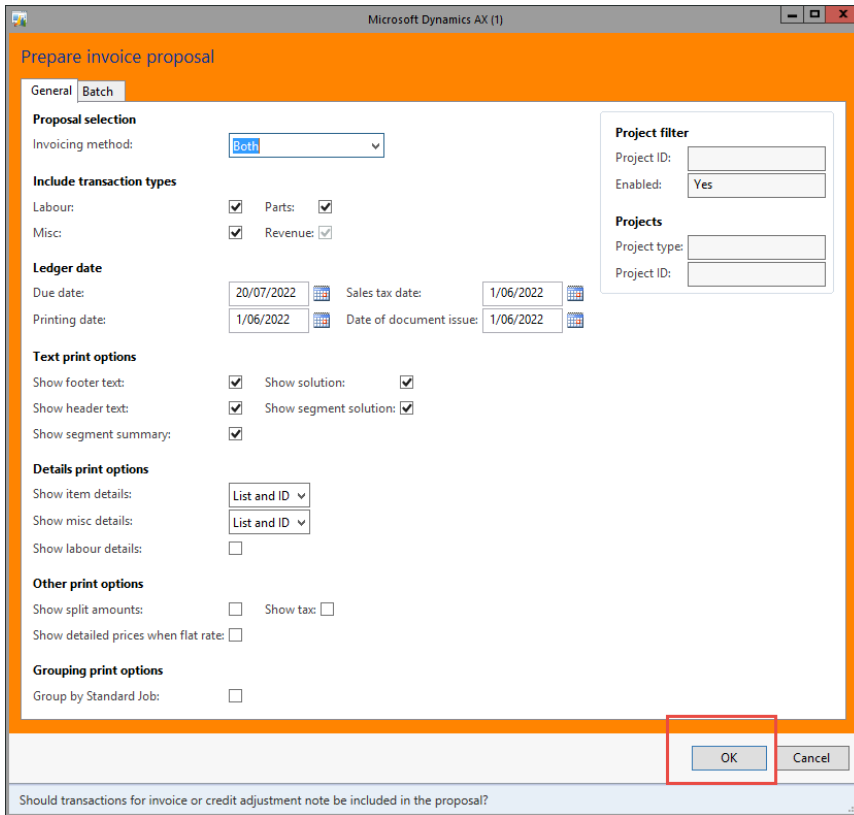
Segment From component structure New Edit Delete Equipment disassembly Quotation Start segment Technician complete Finish segment Reopen Cancel Create invoice proposals Service call closing summary Operation Add standard job Delivery Express

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Finished	Passed	JH700741
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741

< III

Segment details

## 61. Click OK



Microsoft Dynamics AX (1)

Prepare invoice proposal

General Batch

**Proposal selection**  
Invoicing method: Both

**Include transaction types**  
Labour: ☒ Parts: ☒  
Misc: ☒ Revenue: ☒

**Ledger date**  
Due date: 20/07/2022 Sales tax date: 1/06/2022  
Printing date: 1/06/2022 Date of document issue: 1/06/2022

**Text print options**  
Show footer text: ☒ Show solution: ☒  
Show header text: ☒ Show segment solution: ☒  
Show segment summary: ☒

**Details print options**  
Show item details: List and ID  
Show misc details: List and ID  
Show labour details: ☐

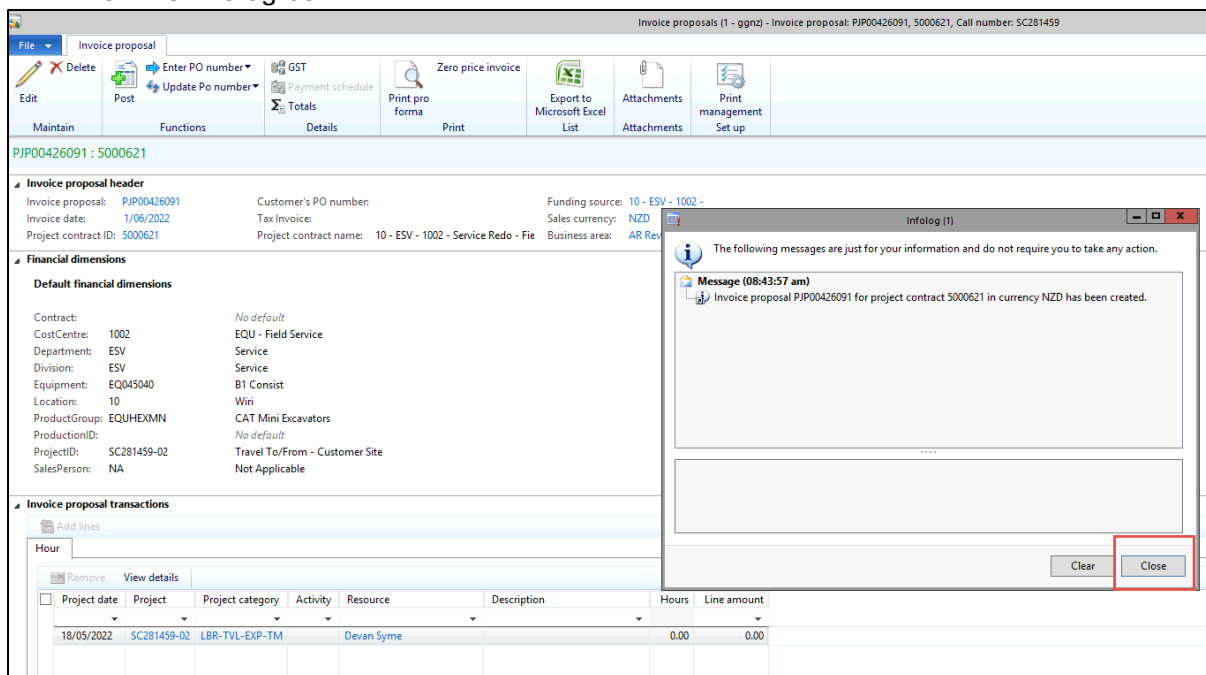
**Other print options**  
Show split amounts: ☐ Show tax: ☐  
Show detailed prices when flat rate: ☐

**Grouping print options**  
Group by Standard Job: ☐

OK Cancel

Should transactions for invoice or credit adjustment note be included in the proposal?

## 62. Invoice proposal has now been created and it should only show the zero line > click Close on the Infolog box



Invoice proposals (1 - ggnz) - Invoice proposal: PJP00426091, 5000621, Call number: SC281459

File Edit Post Enter PO number Update Po number GST Payment schedule Zero price invoice Export to Microsoft Excel Attachments Print pro forma Attachments Print management Set up

Maintain Functions Details Print List Attachments Set up

PJP00426091 : 5000621

**Invoice proposal header**  
Invoice proposal: PJP00426091 Customer's PO number: 10 - ESV - 1002 - Funding source: 10 - ESV - 1002 -  
Invoice date: 1/06/2022 Tax Invoice: NZD Sales currency: NZD  
Project contract ID: 5000621 Project contract name: 10 - ESV - 1002 - Service Redo - Fi Business area: AR Rev

**Financial dimensions**  
**Default financial dimensions**  
Contract: No default  
CostCentre: 1002 EQU - Field Service  
Department: ESV Service  
Division: ESV Service  
Equipment: EQ045040 B1 Consist  
Location: 10 Wiri  
ProductGroup: EQUHEXMN CAT Mini Excavators  
ProductionID: No default  
ProjectID: SC281459-02 Travel To/From - Customer Site  
SalesPerson: NA Not Applicable

**Invoice proposal transactions**  
Add lines  
Hour  
Remove View details  
Project date Project Project category Activity Resource Description Hours Line amount  
18/05/2022 SC281459-02 LBR-TVL-EXP-TM Devan Syme 0.00 0.00

Infolog (1)  
The following messages are just for your information and do not require you to take any action.  
Message (08:43:57 am)  
Invoice proposal PJP00426091 for project contract 5000621 in currency NZD has been created.  
Clear Close

### 63. Click Post

Invoice proposals (1 - ggnz) - Invoice proposal: PJP00426091, 5000621

File Edit Delete Enter PO number Update Po number GST Payment schedule Totals Print pro forma Print Export to Microsoft Excel List Attachments Print management Set up

PJP00426091 : 5000621

**Invoice proposal header**

Invoice proposal: PJP00426091 Customer's PO number: Funding source: 10 - ESV - 1002 -  
 Invoice date: 1/06/2022 Tax Invoice: Sales currency: NZD  
 Project contract ID: 5000621 Project contract name: 10 - ESV - 1002 - Service Redo - Field Service Business area: AR Revenue

**Financial dimensions**

**Default financial dimensions**

Contract: No default  
 CostCentre: 1002 EQU - Field Service  
 Department: ESV Service  
 Division: ESV Service  
 Equipment: EQ045040 B1 Consist  
 Location: 10 Wiri  
 ProductGroup: EQUHEXMIN CAT Mini Excavators  
 ProductionID: No default  
 ProjectID: SC281459-02 Travel To/From - Customer Site  
 SalesPerson: NA Not Applicable

**Invoice proposal transactions**

Add lines

Hour

Project date	Project	Project category	Activity	Resource	Description	Hours	Line amount
18/05/2022	SC281459-02	LBR-TVL-EXP-TM		Devan Syme		0.00	0.00

### 64. Click OK

Post invoice proposals (1 - ggnz)

Parameters Other

**Parameter**

Posting: ☒

**Service call status change**

Invoice status change: ☒

**Selection**

Late selection: ☒

Make a selection by clicking Select on this form.

**Print options**

Print: Current  
 Print invoice: ☐  
 Use print management destination: ☐

Select  
 Printer setup  
 GST

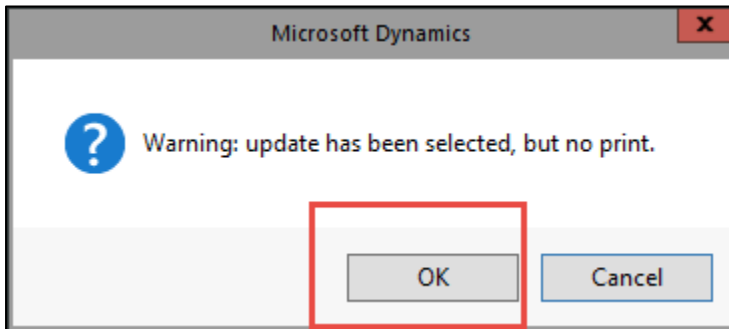
**Overview**

Invoice proposal	Invoice account	Invoice date	Name	Project contract ID
PJP00426091	5000621	1/06/2022	10 - ESV - 1002 - Service Redo - Field Service	5000621

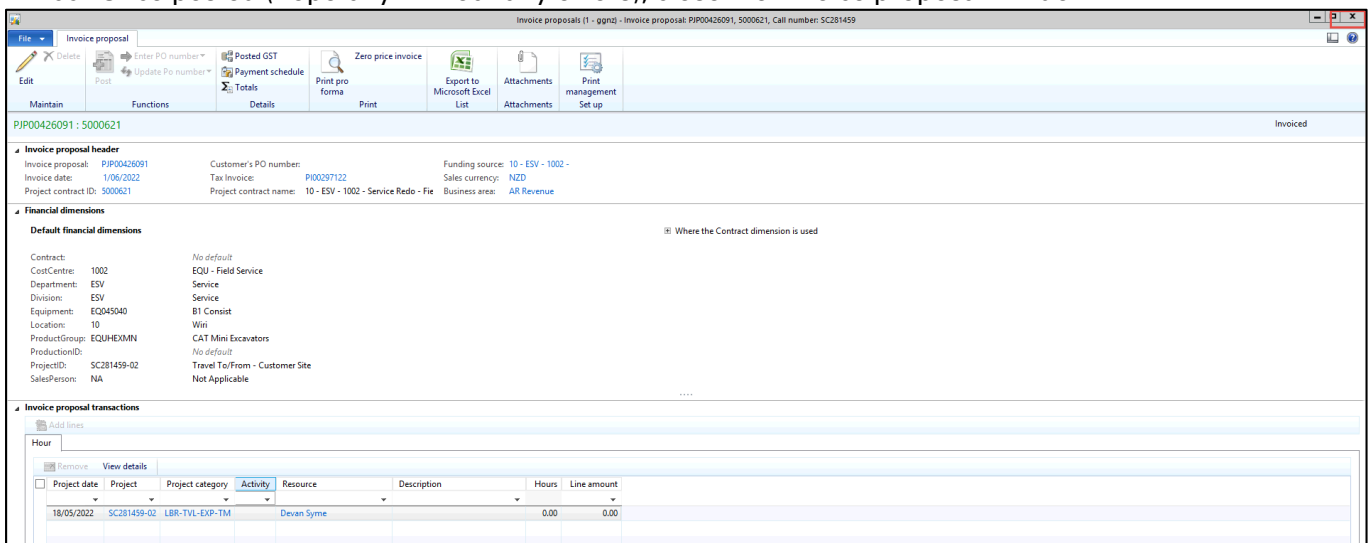
OK Cancel Batch

Change the status of the related service call to invoiced.

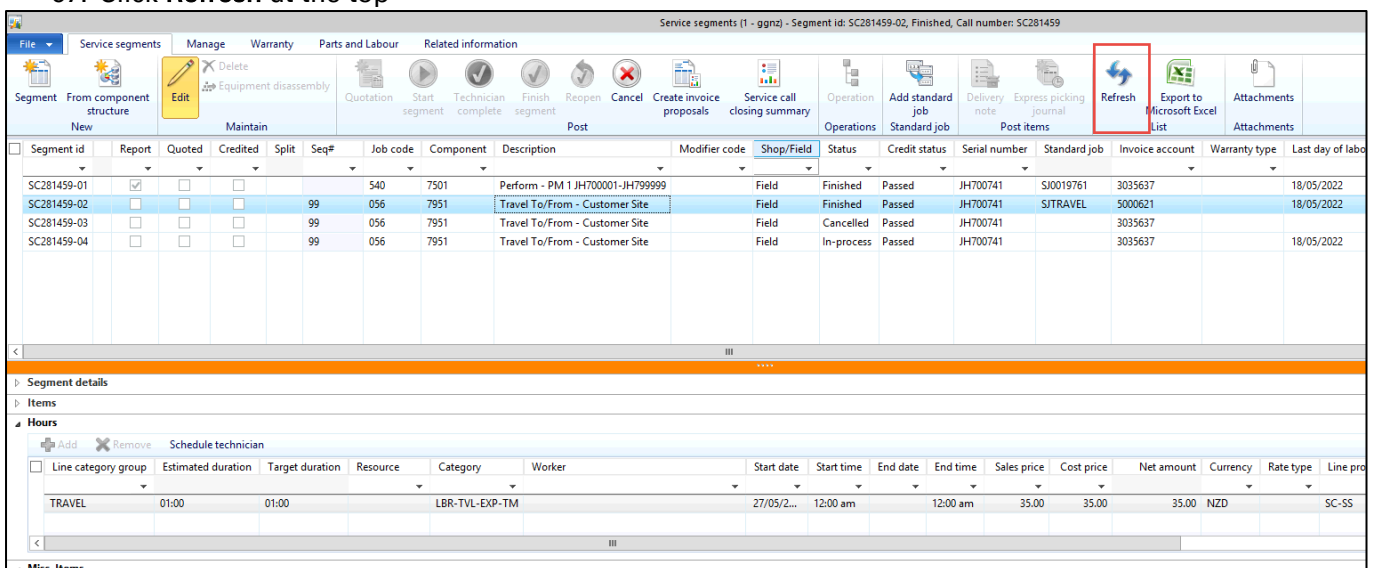
65. Click OK



66. Once posted (hopefully without any errors), close the invoice proposal window



67. Click Refresh at the top



## 68. The old segment should now say invoiced

Service segments (1 - ggnz) - Segment id: SC281459-02, Invoiced, Call number: SC281459														
Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ0019761
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Invoiced	Passed	JH700741	SJTRAVEL
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741	
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	

## 69. You now need to add the misc cost line to the new segment

## 70. Select the new segment

## 71. Expand Misc Costs

## 72. Click Add

Service segments (1 - ggnz) - Segment id: SC281459-04, In-process, Call number: SC281459

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 summary

Operations

Add standard job

Delivery note

Express picking journal

Refresh

Export to Microsoft Excel

Attach

New

Maintain

Post

Operations

Standard job

Post items

List

Attach

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ0019761	3035637	
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Invoiced	Passed	JH700741	SJTRAVEL	5000621	
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741		3035637	
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741		3035637	

Segment details

Items

Hours

Misc. Items

Misc. Costs

Add

Remove

Recalculate

Freight charge calculation...

Line

Category

Line status

Quantity

Description

Unit

Sales price

Cost price

Net amount

Currency

Line property

Worker

Item GST

This grid is empty.

## 73. Misc Cost line is now added

Service segments (1 - ggnz) - Segment id: SC281459-04, In-process, Call number: SC281459														
Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job
SC281459-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		540	7501	Perform - PM 1 JH700001-JH799999		Field	Finished	Passed	JH700741	SJ0019761
SC281459-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Invoiced	Passed	JH700741	SJTRAVEL
SC281459-03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	Cancelled	Passed	JH700741	
SC281459-04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	7951	Travel To/From - Customer Site		Field	In-process	Passed	JH700741	

Segment details																																												
Items																																												
Hours																																												
Misc. Items																																												
<div> <div> <div>+</div> <div>Add</div> </div> <div> <div>✖</div> <div>Remove</div> </div> <div> <div>↺</div> <div>Recalculate</div> </div> <div> <div>📄</div> <div>Freight charge calculation...</div> </div> </div> <table> <tr> <th>Line</th><th>Category</th><th>Line status</th><th>Quantity</th><th>Description</th><th>Unit</th><th>Sales price</th><th>Cost price</th><th>Net amount</th><th>Currency</th><th>Line property</th><th>Worker</th><th>Item GST</th><th>GST group</th><th>Date</th></tr> <tr> <td>KM1</td><td>MSC-KM1-REV-TM</td><td>New</td><td>6.00</td><td>Vehicle Km</td><td></td><td>1.50</td><td>1.50</td><td>9.00</td><td>NZD</td><td>CHARGEABLE</td><td>Danielle Murphy</td><td>ALL</td><td>GST</td><td>18/05/2022</td></tr> </table>															Line	Category	Line status	Quantity	Description	Unit	Sales price	Cost price	Net amount	Currency	Line property	Worker	Item GST	GST group	Date	KM1	MSC-KM1-REV-TM	New	6.00	Vehicle Km		1.50	1.50	9.00	NZD	CHARGEABLE	Danielle Murphy	ALL	GST	18/05/2022
Line	Category	Line status	Quantity	Description	Unit	Sales price	Cost price	Net amount	Currency	Line property	Worker	Item GST	GST group	Date																														
KM1	MSC-KM1-REV-TM	New	6.00	Vehicle Km		1.50	1.50	9.00	NZD	CHARGEABLE	Danielle Murphy	ALL	GST	18/05/2022																														