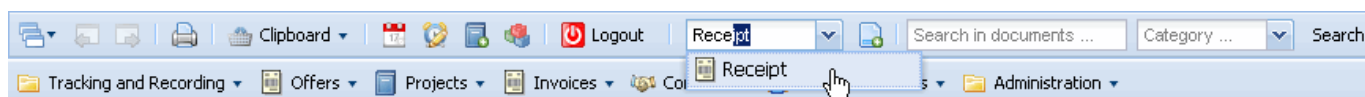


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4.09.1 Receipts, Trips and External Costs

Receipts

To create a receipt, select document type „Receipt“ in the work area.



The document Type Receipt provides the project-oriented registration of costs. For example material (copies, paper), traveling costs (taxi, train, and plane), accommodation or similar costs can be documented. After creating a receipt, some fields are pre-set...

 A screenshot of a web-based form titled 'Receipt 6'. The form is organized into several sections with labels on the left:

- Receipt**: A text field containing the number '6'.
- Cost**: A dropdown menu and several icons.
- Description**: A dropdown menu.
- Employee**: A dropdown menu with 'Conner Jane' selected, followed by icons.
- Project**: A dropdown menu and icons.
- Date**: A date picker set to '20.10.2009'.
- Payment Method**: A dropdown menu.
- Travel**: A section header.
- Net amounts**: Fields for 'Amount' (with 'EUR' currency), 'Original currency amount', and 'Original currency' (with 'GBP' currency).
- Value added tax**: A dropdown menu set to 'VAT-GB-15' and icons.
- Amount total**: A text field with 'EUR' currency.
- Note**: A large text area for additional information.
- Billable**: A dropdown menu and a 'Cash up' checkbox.
- Invoice header**: A label at the bottom of the form.

...the remaining information should be filled out and the receipts should be saved.

Receipt 6 Taxi

Document ▾ Edit ▾ View ▾ Back references ▾

Receipt 6

Cost Travel costs [icon] [icon] [icon] [icon] [icon]

Description Taxi [icon]

Employee [icon] Conner Jane [icon] [icon] [icon] [icon] [icon]

Project [icon] 6.2 Implementation [icon] [icon] [icon] [icon] [icon]

Date 20.10.2009 [icon]

Payment Method ECCard [icon]

Travel

Net amounts Amount 99,16 EUR Original currency amount 90,81 Original currency GBP [icon] [icon] [icon] [icon]

Value added tax VAT-GB-15 [icon] [icon] [icon] [icon] [icon]

Amount total 114,03 EUR

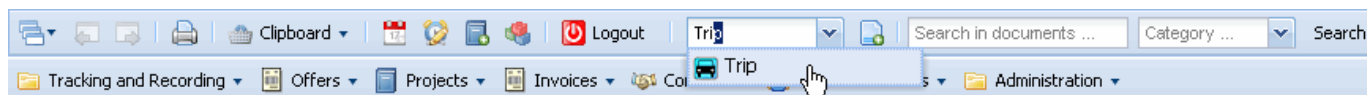
Note

Billable [icon] Cash up ☐

Invoice header

Trips

Project-oriented trips and costs can be entered and recorded in the “trips” document, which the project employee has caused for the project.



The traveling costs can be assigned to a trip through selection of an already recorded trip. After creating the trip, some fields are pre-set...

Trip 16 20.10.2009 12:21:32	
Document Edit View	
Trip	16
Employee	Conner Jane Find Print Delete
Project	Find Print Delete
Registration number	Find Print Delete
Trip start/end date	From 20.10.2009 12:21:32 To 20.10.2009 12:21:32
Route	
Purpose	
Travel	
Level old	km
Level new	km
Distance	km
Number of additional passengers	
Passenger name	
AAAlternative	Miles
Cost type	Drive costs Find Print Delete
Payment Method	
Amount	EUR
Note	
Billable	none Find Cash up ☐
Invoice header	???

...the remaining information should be filled out and the trip should be saved.

Trip 16 20.10.2009 12:21:32 Workshop	
Trip	16
Employee	Conner Jane
Project	2.2 Customizing
Registration number	LB59 ABC
Trip start/end date	From 20.10.2009 12:21:32 To 20.10.2009 12:21:32
Route	London-Cardiff-London
Purpose	Workshop
Travel	
Level old	km
Level new	km
Distance	230 km
Number of additional passengers	1
Passenger name	stuard mech
AAAlternative	Miles
Cost type	Drive costs
Payment Method	Creditcard
Amount	73,60 EUR
Note	
Billable	none Cash up ☐
Invoice header	???

Item Sheet

The Item Sheet document provides assigning the defined master data of the external services and/or items to the project.

Item Sheet	
Tracking and Recording	Offers
Projects	Invoices
Contacts	Human resources
Administration	Item sheet

After creating the item sheet, some fields are pre-set...

Item sheet 2

Document Edit View

Master data Misc

Number 2

Item

Employee Conner Jane

Project

Date 20.10.2009

Cost

NumberGroup Number1 1 Stk Amount 2 1 Stk Amount 3 1 Stk

Item price 0,00 EUR

Sum EUR

Cost center

Note

...the remaining information should be filled out and the external costs should be saved.

Item sheet 2 Projectile Basis Projectile Basis PRB

Document Edit View Back references

Master data Misc

Number 2

Item Projectile Basis Projectile Basis PI

Employee Conner Jane

Project 3 Introduction Projectile

Date 20.10.2009

Cost Travel costs

NumberGroup Number1 1 Stk Amount 2 1 Stk Amount 3 1 Stk

Item price 5.900,00 EUR

Sum 5.900,00 EUR

Cost center Engineering

Note

The external costs and/or the items are, at the same time, defined components out of the master data administration (including sales price).

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