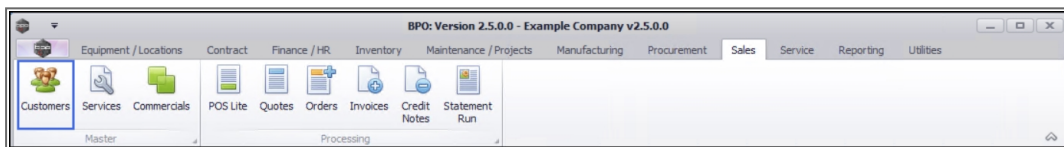


# SALES

## CUSTOMERS - CALL HISTORY

The **Call History** tile can be found in both the Customer Listing and the Customer Maintain screen. This tile will direct you to a data grid of history regarding Calls linked to a specific customer.

**Ribbon Access:** Sales > Customers



1. The **Customer Listing** screen will display.
2. Select the **Site** where the customer can be located.
  - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Active**.
4. Click in the **row** of the customer for whom you wish to view the **Call History** for.
5. Click on the **Call History** tile.

Customer Listing - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Sync View Save Layout Workspaces Hold Release Approve Account Deduct Account

Processing Format Status Processing Current Refresh Export Reports Print Statement

Links Enter text to search...

Functions Notes Contacts Addresses Documents Call History Project History History Equipment

CustomerCode CustomerType CustomerName Department DeptName SiteDescription CustomerCreditLimit CustomerWebSite CustomerPhoneNumber CustomerVATNo

| CustomerCode | CustomerType | CustomerName               | Department | DeptName | SiteDescription | CustomerCreditLimit | CustomerWebSite      | CustomerPhoneNumber | CustomerVATNo |
|--------------|--------------|----------------------------|------------|----------|-----------------|---------------------|----------------------|---------------------|---------------|
| CUS001       | RE           | Cash Sales Account         |            |          | Durban          | 10,000.00           |                      | 000 000 0000        | 0000000000    |
| HOP001       | RE           | Hope Works (Pty) Ltd       |            |          | Durban          | 5,000.00            | www.hopeworks.co.za  | 031 123 4567        | 987654321     |
| DER001       | RE           | Derton / Technologies      |            |          | Durban          | 250.00              | www.dertonweb.co.za  | 031 123 4785        | 987654321     |
| OFF001       | RE           | Office Supplies Unlimited  |            |          | Durban          | 75,000,000.00       | www.cnn.co.za        | 031 789 4561        | 987456321     |
| YES001       | CO           | Young Electric             |            |          | Durban          | 100,000.00          |                      | 082555555           | 2314687641    |
| WES001       | RE           | Westwood Dynamic           |            |          | Durban          | 10,000,000.00       | www.web.co.za        | 031 789 4561        | 123456789     |
| TTA001       | RE           | Titan Group                |            |          | Durban          | 100,000.00          | www.web.co.za        | 031 852 9632        | 123258741369  |
| BOT0001      | IT           | Bothas Networking Inc      |            |          | Durban          | 50,000.00           | www.web.co.za        | 031 789 4563        | 9874563201    |
| SAM001       | RE           | Samanthas Diner            |            |          | Durban          | 45,000.00           | www.samsdiner.co.za  | 031 123 4567        | 123456789     |
| DAN001       | IT           | Danny Storm IT Cafe        |            |          | Durban          | 75,000.00           |                      | 031 785 4785        | 123654789     |
| PAN001       | RE           | Panda Copiers              |            |          | Durban          | 50,000.00           |                      | 031 123 4567        | 123456789     |
| HAC001       | IT           | Hack PC - IT Shop          |            |          | Durban          | 0.00                |                      | 031 789 4561        | 6654357155    |
| PIN0001      | GV           | Pink Shoes                 |            |          | Durban          | 0.00                |                      | 031 456 7894        | 1234          |
| HIL000001    | HILLCRESTP   | Mary Contrary              |            |          | Durban          | 0.00                |                      | 083 559             | 00000         |
| JUS001       | RE           | Just In Time               |            |          | Durban          | 50,000.00           | www.justintime.co.za | 031 123 4567        | 123456789     |
| LIT0001      | RE           | Little Bee Honey           |            |          | Durban          | 0.00                | www.bee.co.za        | 031 123 4567        | 123456789     |
| GRE001       | RE           | Green Tea Supplies         |            |          | Durban          | 75,000.00           |                      | 031 456 7891        | 123456789     |
| FIN0001      | RE           | Fine Hair Salon            |            |          | Durban          | 0.00                | www.finehair.co.za   | 031 123 4567        | 1234          |
| BET0001      | RE           | Bettes Summer Shop at t... |            |          | Durban          | 0.00                |                      |                     | 1234          |
| biancad      | RE           | North West Branch          |            |          | Durban          | 0.00                |                      |                     | 0             |
| DAN002       | IT           | Dancing Shoes              |            |          | Durban          | 10,000.00           |                      | 031 123 4567        | 123456789     |
| BIG0001      | CO           | Big Bargains               |            |          | Durban          | 10,000.00           |                      | 031 456 7897        | 123456789     |
| MAN0001      | RE           | Mandy Norton               |            |          | Durban          | 0.00                |                      |                     | 0             |
| DAN0003      | IT           | Dance Shoes                |            |          | Durban          | 0.00                |                      |                     | 123456789     |

Open Windows User : JulandaK 03/12/2020 Version : 2.4.0.11 Example Company

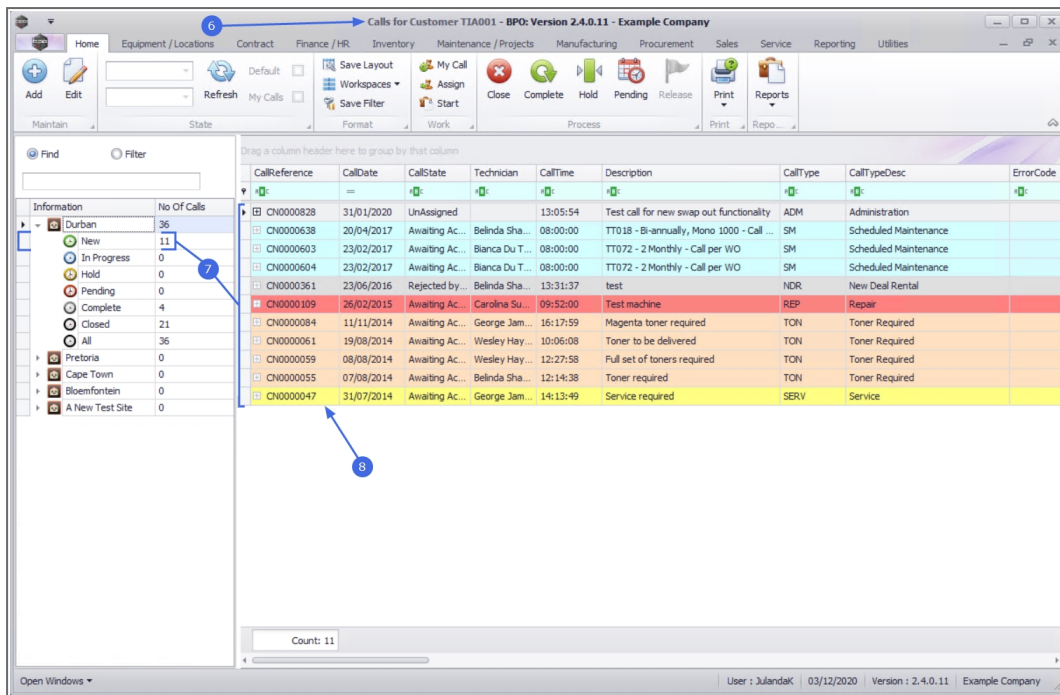
6. The **Calls for Customer** [customer code] screen will display.

## CALLS DATA GRID

- By default, all **New** calls linked for the selected customer will display.
- The Calls are colour-coded by **Call Type**, e.g. all **Service** Calls are displayed as yellow.



**Call Type Colours** can be configured according to your company requirements.



## INFORMATION PANEL

9. The **Information** panel lists the number of calls for each Call Status.
10. You can select to view any Call Status, by clicking on one of the **Call Status** discs on the left of the panel.
  - The example has the **Closed** Call Status selected and all the Closed calls for the customer are displayed in the **Calls for Customer** data grid.

Calls for Customer T1A001 - BPO: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

My Call | Save Layout | Workspaces | Assign | Close | Complete | Hold | Pending | Release | Print | Reports

Find | Filter

Information | No Of Calls

- Durban 36
- New 11
- In Progress 0
- Hold 0
- Pending 0
- Complete 4
- Closed 21
- All 36
- Pretoria 0
- Cape Town 0
- Bloemfontein 0
- A New Test Site 0

| CallReference | CalDate    | CalState     | Technician     | CalTime  | Description                               | CallType | CallTypeDesc          | ErrorCode | ErrorCodeDesc    | SerialNo      | CtrlLoc |
|---------------|------------|--------------|----------------|----------|---|----------|-----------------------|-----------|------------------|---------------|---------|
| CH0000367     | 07/09/2016 | Rejected by  | Bianca Du T... | 13:23:40 | Work flow test                            | REP      | Repair                | EC        | Error Code       | 2020-10201    |         |
| CH0000366     | 07/09/2016 | Rejected by  | Bianca Du T... | 10:56:03 | Work flow notification email test         | TEST     | Testing               | CON       | Contract Service |               | New Gr  |
| CH0000320     | 07/06/2016 | No Signature | Bianca Du T... | 08:03:44 | Machine needs a service                   | SERV     | Service               |           |                  | 19-12-1207    |         |
| CH0000319     | 06/06/2016 | Ended Work   | Bianca Du T... | 17:00:32 | Check machine to see if requested acc.    | INST     | Installation          |           |                  | 2020-10201    |         |
| CH0000318     | 06/06/2016 | Ended Work   | Bianca Du T... | 16:42:03 | Large streaks across pages on print       | REP      | Repair                |           |                  | 2020-10201    |         |
| CH0000316     | 06/06/2016 | Ended Work   | Bianca Du T... | 16:33:00 | Machine not switching on                  | REP      | Repair                |           |                  | 19-12-1207    |         |
| CH0000301     | 01/04/2016 | Rejected by  | Bianca Du T... | 09:14:01 | test                                      | SERV     | Service               | EC        | Error Code       | 19-12-10207   |         |
| CH0000288     | 28/03/2016 | No Signature | Bianca Du T... | 16:08:22 | Test auto supply test                     | INST     | Installation          |           |                  | 2020-10201    |         |
| CH0000225     | 18/11/2015 | No Signature | Wesley Har...  | 14:45:59 | Test partial returns                      | SERV     | Service               |           |                  | 19-12-1207    |         |
| CH0000222     | 18/11/2015 | Ended Work   | Bianca Du T... | 11:36:55 | Test partial non stock procurement pro... | WIC      | Warranty Claim        |           |                  | 19-12-1207    |         |
| CH0000123     | 27/02/2015 | Unassigned   |                | 10:54:00 | Machine service due                       | SERV     | Service               |           |                  | 19-12-1207    |         |
| CH0000115     | 26/02/2015 | Unassigned   |                | 11:11:46 | Check toner levels                        | TON      | Toner Required        |           |                  | 19-12/1201    |         |
| CH0000082     | 06/11/2014 | Rejected by  | Bianca Du T... | 13:11:57 | 3M5 - 3 Month Service                     | SM       | Scheduled Maintenance |           |                  | 20-12345-S... | South R |
| CH0000079     | 06/11/2014 | Rejected by  | Bianca Du T... | 13:10:28 | 3M5 - 3 Month Service                     | SM       | Scheduled Maintenance |           |                  |               |         |
| CH0000071     | 23/09/2014 | Accepted     | Steven Co...   | 13:49:09 | Toner for delivery and machine service    | SERV     | Service               |           |                  | 19-12-1207    |         |
| CH0000065     | 21/08/2014 | Accepted     | Belinda Sha... | 09:00:09 | test                                      | REP      | Repair                |           |                  |               | New Gr  |
| CH0000037     | 21/07/2014 | Ended Work   | Bianca Du T... | 11:48:24 | Machine service required                  | SERV     | Service               | FA        | Faulty           | 20-12345-S... |         |
| CH0000032     | 26/06/2014 | Unassigned   |                | 12:03:50 | Delivery                                  | SERV     | Service               |           |                  | 19-12-1207    |         |
| CH0000029     | 19/06/2014 | Accepted     | Belinda Sha... | 12:53:31 | Paper jam                                 | SERV     | Service               |           |                  | 19-12-1207    |         |
| CH0000028     | 13/06/2014 | Accepted     | Belinda Sha... | 14:43:23 | New Installation                          | NDS      | New Deal Sale         |           |                  |               |         |
| CH0000027     | 16/05/2014 | Unassigned   |                | 08:35:44 | COR 4125 - Machine installation           | NDS      | New Deal Sale         |           |                  |               |         |

Count: 21

User : JulandK | 03/12/2020 | Version : 2.4.0.11 | Example Company

## FIND OPTION

The **Find** option allows you to search for a specific Call, regardless of site, status or date range, using the **Call Reference** number.

1. Make sure that the **'Find' radio button** is selected.
2. In the text box, type in the full **Call Reference** number that you wish to find, then press **Enter**.



Note that the example is currently open in the Durban Site and the **Status** is set to New.



Calls for Customer TIA001 - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Refresh My Calls Workspaces Assign Start Close Complete Hold Pending Release Print Reports

Maintain State Find Filter

Information No Of Calls

Durban 36

New 11

Pretoria 0

New 0

In Progress 0

Hold 0

Pending 0

Complete 0

Closed 0

All 0

Cape Town 0

New 0

In Progress 0

Hold 0

Pending 0

Complete 0

Closed 0

All 0

Bloemfontein 0


New 0

Count: 11

| CallReference | CallDate   | CallState           | Technician                | CallTime | Description                               | CallType | CallTypeDesc          | ErrorCode | ErrorCode |
|---------------|------------|---------------------|---------------------------|----------|---|----------|-----------------------|-----------|-----------|
| CH0000028     | 31/01/2020 | UnAssigned          |                           | 13:05:54 | Test call for new swap out functionality  | ADM      | Administration        |           |           |
| CH0000038     | 20/04/2017 | Awaiting Acceptance | Belinda Sharman           | 08:00:00 | TT018 - Bi-annually, Mono 1000 - Call ... | SM       | Scheduled Maintenance |           |           |
|               |            | Awaiting Acceptance | Bianca Du Toit            | 08:00:00 | TT072 - 2 Monthly - Call per WO           | SM       | Scheduled Maintenance |           |           |
|               |            | Awaiting Acceptance | Bianca Du Toit            | 08:00:00 | TT072 - 2 Monthly - Call per WO           | SM       | Scheduled Maintenance |           |           |
|               |            | ected by Tech       | Belinda Sharman           | 13:31:37 | test                                      | NDR      | New Deal Rental       |           |           |
|               |            | Awaiting Acceptance | Carolina Suzzetta Lour... | 09:52:00 | Test machine                              | REP      | Repair                |           |           |
|               |            | Awaiting Acceptance | George James Reddy ...    | 16:17:59 | Magenta toner required                    | TON      | Toner Required        |           |           |
|               |            | Awaiting Acceptance | Wesley Haynes             | 10:06:08 | Toner to be delivered                     | TON      | Toner Required        |           |           |
| CH0000059     | 08/08/2014 | Awaiting Acceptance | Wesley Haynes             | 12:27:58 | Full set of toners required               | TON      | Toner Required        |           |           |
| CH0000055     | 07/08/2014 | Awaiting Acceptance | Belinda Sharman           | 12:14:38 | Toner required                            | TON      | Toner Required        |           |           |
| CH0000047     | 31/07/2014 | Awaiting Acceptance | George James Reddy ...    | 14:13:49 | Service required                          | SERV     | Service               |           |           |

3. The example is set to search for **CN0000222**.
  - The system has filtered for this Call Reference number and selected it.
4. The search has resulted in the Call being located in the ***Closed*** status.



 **Note** that if the full reference number is not entered, the system will not be able to search for the specific Call and will return an **error** message.

Calls for Customer TIA001 - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Refresh My Calls Save Layout Workspaces Save Filter Assign Start Close Complete Hold Pending Release Print Reports

Find Filter

CH0000222

Information No Of Calls

- Durban 36
- New 11
- In Progress 0
- Hold 0
- Pending 0
- Complete 4
- Closed 21
- All 36
- Pretoria 0
- New 0
- In Progress 0
- Hold 0
- Pending 0
- Complete 0
- Closed 0
- All 0
- Cape Town 0
- New 0
- In Progress 0
- Hold 0
- Pending 0
- Complete 0
- Closed 0
- All 0
- Bloemfontein 0
- New 0

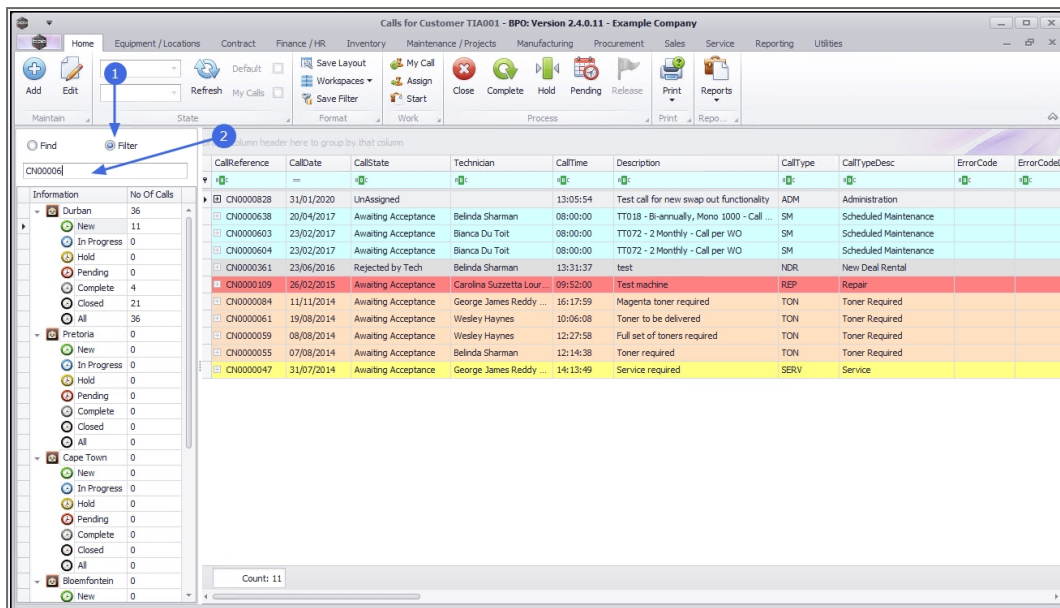
| CallReference | CallDate   | CallState        | Technician      | CallTime | Description                               | CallType | CallTypeDesc          | ErrorCode | ErrorCodeD  |
|---------------|------------|------------------|-----------------|----------|---|----------|-----------------------|-----------|-------------|
| CH0000367     | 07/09/2016 | Rejected by Tech | Bianca Du Toit  | 13:23:40 | Work flow test                            | REP      | Repair                | EC        | Error Code  |
| CH0000366     | 07/09/2016 | Rejected by Tech | Bianca Du Toit  | 10:56:03 | Work flow notification email test         | TEST     | Testing               | CON       | Contract Se |
| CH0000320     | 07/06/2016 | No Signature     | Bianca Du Toit  | 08:03:44 | Machine needs a service                   | SERV     | Service               |           |             |
| CH0000319     | 06/06/2016 | Ended Work       | Bianca Du Toit  | 17:00:32 | Check machine to see if requested acc...  | INST     | Installation          |           |             |
| CH0000318     | 06/06/2016 | Ended Work       | Bianca Du Toit  | 16:43:03 | Large streaks across pages on print       | REP      | Repair                |           |             |
| CH0000316     | 06/06/2016 | Ended Work       | Bianca Du Toit  | 16:33:00 | Machine not switching on                  | REP      | Repair                |           |             |
| CH0000301     | 01/04/2016 | Rejected by Tech | Bianca Du Toit  | 09:14:01 | test                                      | SERV     | Service               | EC        | Error Code  |
| CH0000298     | 29/03/2016 | No Signature     | Bianca Du Toit  | 16:08:22 | Test auto apply task                      | INST     | Installation          |           |             |
| CH0000225     | 18/11/2015 | No Signature     | Wesley Haynes   | 14:45:59 | Test partial returns                      | SERV     | Service               |           |             |
| CH0000222     | 18/11/2015 | Ended Work       | Bianca Du Toit  | 11:36:55 | Test partial non stock procurement pro... | WC       | Warranty Claim        |           |             |
| CH0000123     | 27/02/2015 | Unassigned       |                 | 10:54:00 | Machine service due                       | SERV     | Service               |           |             |
| CH0000115     | 26/02/2015 | Unassigned       |                 | 11:11:46 | Check toner levels                        | TON      | Toner Required        |           |             |
| CH0000082     | 06/11/2014 | Rejected by Tech | Bianca Du Toit  | 13:11:57 | 3MS - 3 Month Service                     | SM       | Scheduled Maintenance |           |             |
| CH0000079     | 06/11/2014 | Rejected by Tech | Bianca Du Toit  | 13:10:28 | 3MS - 3 Month Service                     | SM       | Scheduled Maintenance |           |             |
| CH0000071     | 23/09/2014 | Accepted         | Steven Cooper   | 13:49:09 | Toner for delivery and machine service    | SERV     | Service               |           |             |
| CH0000065     | 21/08/2014 | Accepted         | Belinda Sharman | 09:00:09 | test                                      | REP      | Repair                |           |             |
| CH0000037     | 21/07/2014 | Ended Work       | Bianca Du Toit  | 11:48:24 | Machine service required                  | SERV     | Service               | FA        | Faulty      |
| CH0000032     | 26/06/2014 | Unassigned       |                 | 12:03:50 | Delivery                                  | SERV     | Service               |           |             |
| CH0000029     | 19/06/2014 | Accepted         | Belinda Sharman | 12:53:31 | Paper jam                                 | SERV     | Service               |           |             |
| CH0000028     | 13/06/2014 | Accepted         | Belinda Sharman | 14:43:23 | New Installation                          | NDS      | New Deal Sale         |           |             |
| CH0000027     | 16/05/2014 | Unassigned       |                 | 08:35:44 | COR 4125 - Machine installation           | NDS      | New Deal Sale         |           |             |

Count: 21

## FILTER OPTION

The **Filter** option allows you to specify a range of Calls by typing the prefix or part of the Call Reference number.

1. Make sure that the **'Filter' radio button** is selected.
2. Type the **Call Reference** number up to the point where you would like to display the range and press **Enter**.



| CallReference | CallDate   | CallState           | Technician               | CallTime | Description                               | CallType | CallTypeDesc          | ErrorCode | ErrorDesc |
|---------------|------------|---------------------|--------------------------|----------|---|----------|-----------------------|-----------|-----------|
| CN0000028     | 31/01/2020 | UnAssigned          |                          | 13:05:54 | Test call for new swap out functionality  | ADM      | Administration        |           |           |
| CN0000038     | 20/04/2017 | Awaiting Acceptance | Belinda Sharman          | 08:00:00 | TT018 - Bi-annually, Mono 1000 - Call ... | SM       | Scheduled Maintenance |           |           |
| CN0000063     | 23/02/2017 | Awaiting Acceptance | Blanca Du Toit           | 08:00:00 | TT072 - 2 Monthly - Call per WO           | SM       | Scheduled Maintenance |           |           |
| CN0000064     | 23/02/2017 | Awaiting Acceptance | Blanca Du Toit           | 08:00:00 | TT072 - 2 Monthly - Call per WO           | SM       | Scheduled Maintenance |           |           |
| CN00000361    | 23/06/2016 | Rejected by Tech    | Belinda Sharman          | 13:31:37 | test                                      | NDR      | New Deal Rental       |           |           |
| CN00000109    | 26/02/2015 | Awaiting Acceptance | Carolina Suzzetta Lou... | 09:53:00 | Test machine                              | REP      | Repair                |           |           |
| CN00000084    | 11/11/2014 | Awaiting Acceptance | George James Reddy ...   | 16:17:59 | Magenta toner required                    | TON      | Toner Required        |           |           |
| CN00000061    | 19/08/2014 | Awaiting Acceptance | Wesley Haynes            | 10:06:08 | Toner to be delivered                     | TON      | Toner Required        |           |           |
| CN00000059    | 08/08/2014 | Awaiting Acceptance | Wesley Haynes            | 12:27:58 | Full set of toners required               | TON      | Toner Required        |           |           |
| CN00000055    | 07/08/2014 | Awaiting Acceptance | Belinda Sharman          | 12:14:38 | Toner required                            | TON      | Toner Required        |           |           |
| CN00000047    | 31/07/2014 | Awaiting Acceptance | George James Reddy ...   | 14:13:49 | Service required                          | SERV     | Service               |           |           |

- The example has the Reference **CN00006** entered, which will search for and display all the Call References that start with CN00006.



Note that the Call Reference column filter row added the '%' variable at the end of the Call Reference, and the Edit Filter row now contains the filter details: [Call Reference] Like 'CN00006%'.

- To **remove** the Filter, either, **Delete** or **backspace** over the text in the in the *Filter Row* of the **Call Reference** column, or click on the [X] in the **Edit Filter** row.

Applied Filter: [CallReference] Like 'CN00006%'

| CallReference | CallDate   | CallState      | Technician     | CallTime | Description                              | CallType | CallTypeDesc          | ErrorCode | ErrorCodeDesc | SerialNo   | CtrlLoc    |
|---------------|------------|----------------|----------------|----------|--|----------|-----------------------|-----------|---------------|------------|------------|
| CH0000038     | 20/04/2017 | Awaiting Ac... | Belinda Sha... | 08:00:00 | TT018 - Bi-annually, Mono 1000 - Call... | SM       | Scheduled Maintenance |           |               | 19-12-1207 | South R... |
| CH00000503    | 23/02/2017 | Awaiting Ac... | Bianca Du T... | 08:00:00 | TT072 - 2 Monthly - Call per WO          | SM       | Scheduled Maintenance |           |               |            |            |
| CH00000504    | 23/02/2017 | Awaiting Ac... | Bianca Du T... | 08:00:00 | TT072 - 2 Monthly - Call per WO          | SM       | Scheduled Maintenance |           |               | 2020-10201 |            |

Count: 3

Filter: [CallReference] Like 'CN00006%'

## LOG A CALL

1. From the **Calls for Customer** [customer code] screen,
2. Click on **Add**.

6 Add

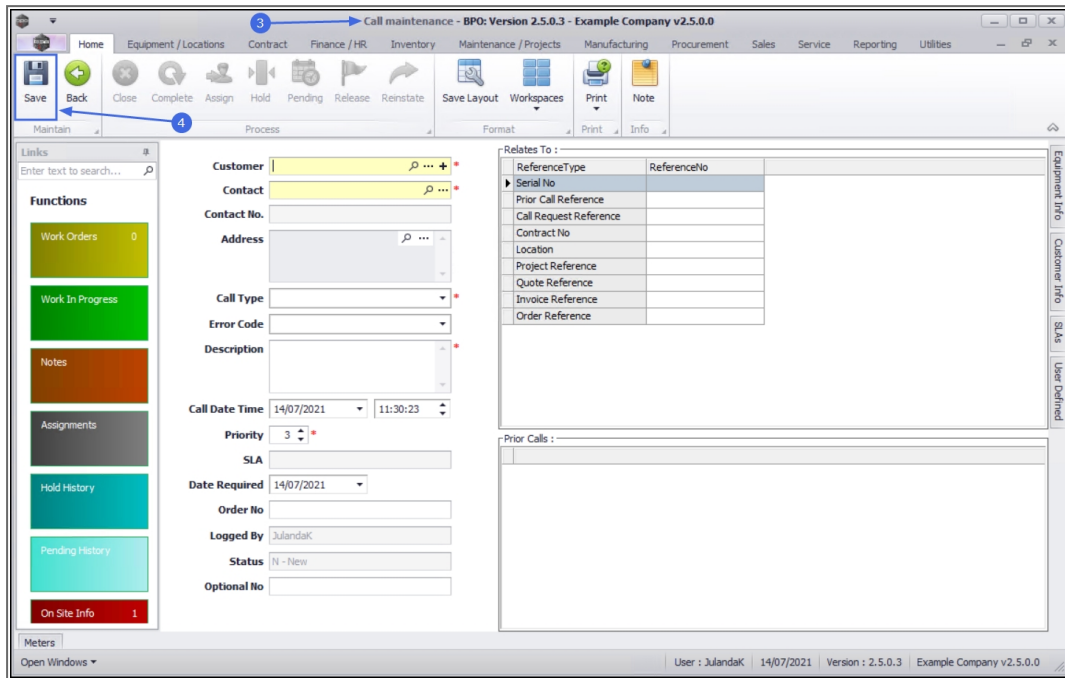
8

Calls for Customer DER001 - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

| CallReference | CallDate   | CallState           | Technician      | CallTime | Description                               | CallType | CallTypeDesc          |
|---------------|------------|---------------------|-----------------|----------|---|----------|-----------------------|
| CH00000817    | 15/05/2019 | UnAssigned          |                 | 16:34:07 | test call for erroneous time log entry.   | ADM      | Administration        |
| CH00000801    | 15/11/2018 | UnAssigned          |                 | 11:53:38 | Call against a short term contract.       | INSP     | Inspection            |
| CH00000800    | 15/11/2018 | Awaiting Acceptance | Bianca Du Toit  | 10:53:13 | Copier not working properly               | INSP     | Inspection            |
| CH00000740    | 04/05/2018 | Awaiting Acceptance | Belinda Sharman | 08:00:00 | TT008 - Mono 1000, Colour 1000 - Call...  | SM       | Scheduled Maintenance |
| CH00000569    | 14/03/2018 | UnAssigned          |                 | 11:01:47 | test                                      | NDR      | New Deal Rental       |
| CH00000567    | 12/03/2018 | UnAssigned          |                 | 16:19:00 | TestNDRIssueTeamJohn                      | NDS      | New Deal Sale         |
| CH00000566    | 12/03/2018 | UnAssigned          |                 | 14:32:12 | test                                      | NDR      | New Deal Rental       |
| CH00000564    | 09/03/2018 | UnAssigned          |                 | 16:05:58 | test                                      | NDS      | New Deal Sale         |
| CH00000563    | 27/02/2018 | UnAssigned          |                 | 13:30:46 | Machine service required                  | SERV     | Service               |
| CH00000513    | 02/08/2017 | UnAssigned          |                 | 11:27:00 | Warranty claim with parts only            | TEST     | Testing               |
| CH00000660    | 10/07/2017 | Awaiting Acceptance | Bianca Du Toit  | 08:00:00 | 3MS - 3 Month Service                     | NDS      | New Deal Sale         |
| CH00000444    | 20/04/2017 | Awaiting Acceptance | Judith Mudzengi | 12:42:57 | Retest                                    | NDR      | New Deal Rental       |
| CH00000440    | 13/04/2017 | UnAssigned          |                 | 13:31:57 | Return all from short term contract ST... | DR       | Select Call Type      |
| CH00000633    | 11/04/2017 | Awaiting Acceptance | Belinda Sharman | 08:00:00 | TT003 - Monthly - Call per WO             | SM       | Scheduled Maintenance |
| CH00000434    | 04/04/2017 | UnAssigned          |                 | 08:49:25 | Warranty                                  | SERV     | Service               |
| CH00000431    | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:35:03 | Installation Testing team                 | INST     | Installation          |
| CH00000430    | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:29:19 | Parts requirement                         | PR       | Parts Requirement     |
| CH00000421    | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation          |
| CH00000421    | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation          |
| CH00000421    | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation          |

Count: 31

3. " The Call maintenance screen will be displayed. " on page 2
4. Complete the Call information for the Customer and click on **Save**.



Call maintenance - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Links: Enter text to search...

Functions: Work Orders 0, Work In Progress, Notes, Assignments, Hold History, Pending History, On Site Info 1

Customer: [Field]  
 Contact: [Field]  
 Contact No.: [Field]  
 Address: [Field]  
 Call Type: [Field]  
 Error Code: [Field]  
 Description: [Field]  
 Call Date Time: 14/07/2021 11:30:23  
 Priority: 3  
 SLA: [Field]  
 Date Required: 14/07/2021  
 Order No: [Field]  
 Logged By: JulandaK  
 Status: N - New  
 Optional No: [Field]

| ReferenceType          | ReferenceNo |
|------------------------|-------------|
| Serial No              |             |
| Prior Call Reference   |             |
| Call Request Reference |             |
| Contract No            |             |
| Location               |             |
| Project Reference      |             |
| Quote Reference        |             |
| Invoice Reference      |             |
| Order Reference        |             |

Prior Calls:

Metres: [Field]  
 Open Windows: [Field]

User: JulandaK | 14/07/2021 | Version: 2.5.0.3 | Example Company v2.5.0.0

## EDIT A CALL

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site** and **Call Status**.
  - The example has **Durban** and **New** call status selected.
3. Click on the **row** of the Call you wish to edit.
4. Click on **Edit**.

5. " The Call maintenance: Call ref. - [call ref number] screen will be displayed. " on page 2
6. Make the necessary changes to the Call information and click on **Save**.



## STATE PANEL

In the State panel the following filters are not available in this view, because all the calls linked to the specific customer are displayed:

- **Start Date,**
- **End Date,**
- **Default** and
- **My Calls.**

The **Refresh** button will update the ***Calls for Customer*** screen with the latest version of the information. Any changes made from the ribbon will be updated in the Call List data grid.



## FORMAT PANEL

Any changes that you may have made to the ***Calls for Customer*** screen e.g. changing the column order or resizing columns, will return to the original layout when you exit the screen. By clicking on ***Save Layout***, ***Workspaces*** or ***Save Filter*** in the ***Format*** panel, will save your settings for the next time you select a customer and open this screen.



For a detailed handling of this topic refer to BPO2 Data Grid Layouts





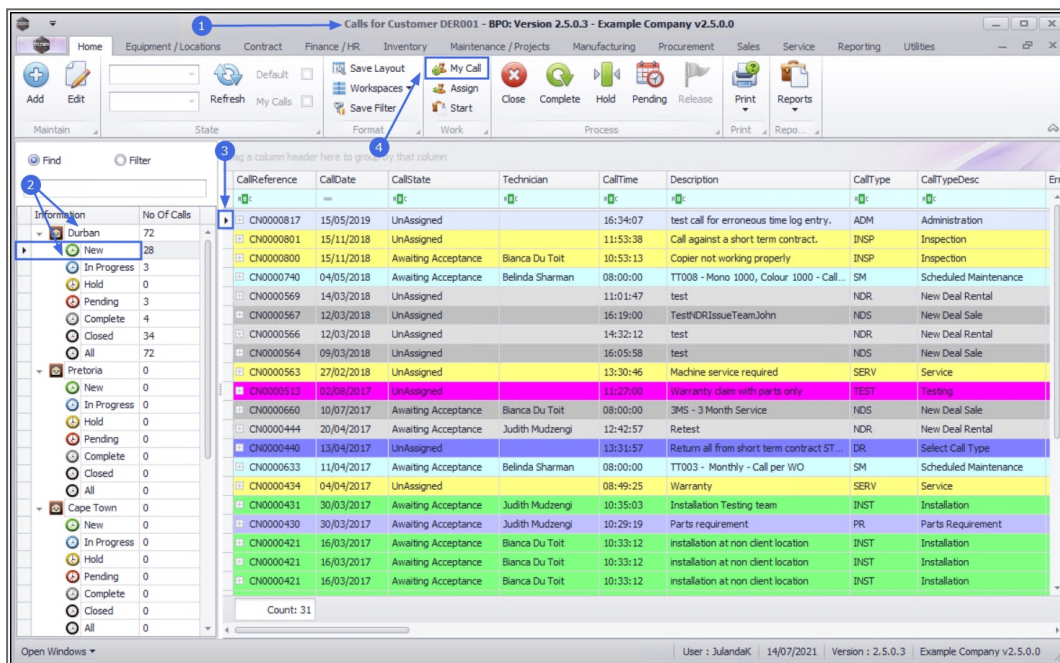
## MY CALL

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site** and the **Call Status**.
  - The example has **Durban** and **New** call status selected.
3. Click on the **row** of the Call you wish to assign to yourself.



Note that the **Technician** field is currently empty and the **Call State** is **UnAssigned**.

4. Click on **My Call**.



5. When you receive the **Input Validation** message to confirm;
  - **This call, [call ref number], is in status - [status]. Do you still want to take ownership?**
6. Click on **Yes**.

Input Validation

This call, CN0000817, is in status - New. Do you still want to take ownership?

Yes No

7. Next you will receive the **Call Processing** message to confirm;

- **Ownership of call, reference [call ref number], has been successful.**

8. Click on **OK**.

Call Processing

Ownership of call, reference CN0000817, has been successful.

OK

- The call has now been updated with the name of the **Technician** currently logged on to the system and the **Call Status** has changed to Awaiting Acceptance.

| CallReference | CallDate   | CallState           | Technician      | CallTime | Description                               | CallType | CallTypeDesc          |
|---------------|------------|---------------------|-----------------|----------|---|----------|-----------------------|
| CH00000817    | 15/05/2019 | Awaiting Acceptance | Julanda Kessler | 16:34:07 | test call for erroneous time log entry.   | ADM      | Administration        |
| CH00000801    | 15/11/2018 | UnAssigned          |                 | 11:53:38 | Call against a short term contract.       | INSP     | Inspection            |
| CH00000800    | 15/11/2018 | Awaiting Acceptance | Bianca Du Toit  | 10:53:13 | Copier not working properly               | INSP     | Inspection            |
| CH00000740    | 04/05/2018 | Awaiting Acceptance | Belinda Sharnan | 08:00:00 | TT008 - Mono 1000, Colour 1000 - Call...  | SM       | Scheduled Maintenance |
| CH00000569    | 14/03/2018 | UnAssigned          |                 | 11:01:47 | test                                      | NDR      | New Deal Rental       |
| CH00000567    | 12/03/2018 | UnAssigned          |                 | 16:19:00 | TestNDRIssueTeamJohn                      | NDS      | New Deal Sale         |
| CH00000566    | 12/03/2018 | UnAssigned          |                 | 14:32:12 | test                                      | NDR      | New Deal Rental       |
| CH00000564    | 09/03/2018 | UnAssigned          |                 | 16:05:58 | test                                      | NDS      | New Deal Sale         |
| CH00000563    | 27/02/2018 | UnAssigned          |                 | 13:30:46 | Machine service required                  | SERV     | Service               |
| CH00000513    | 02/08/2017 | UnAssigned          |                 | 11:27:08 | Warranty claim with parts only            | TEST     | Testing               |
| CH00000660    | 10/07/2017 | Awaiting Acceptance | Bianca Du Toit  | 08:00:00 | 3MS - 3 Month Service                     | NDS      | New Deal Sale         |
| CH00000444    | 20/04/2017 | Awaiting Acceptance | Judith Mudzengi | 12:42:57 | Retest                                    | NDR      | New Deal Rental       |
| CH00000440    | 13/04/2017 | UnAssigned          |                 | 13:31:57 | Return all from short term contract ST... | DR       | Select Call Type      |
| CH00000633    | 11/04/2017 | Awaiting Acceptance | Belinda Sharnan | 08:00:00 | TT003 - Monthly - Call per WO             | SM       | Scheduled Maintenance |
| CH00000434    | 04/04/2017 | UnAssigned          |                 | 08:49:25 | Warranty                                  | SERV     | Service               |
| CH00000431    | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:35:03 | Installation Testing team                 | INST     | Installation          |
| CH00000430    | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:29:19 | Parts requirement                         | PR       | Parts Requirement     |
| CH00000421    | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation          |
| CH00000421    | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation          |

## ASSIGN A CALL

By assigning an employee to a call, will move the call to the **In Progress** status. By assigning the call to a Technician, Driver, or Responsible Person will identify who will be working on the call.

- From the **Calls for Customer [customer code]** screen,
- Select the **Site** and the **Call Status**.
  - The example has **Durban** and **New** call status selected.
- Click on the **row** of the Call you wish to assign.

Note that the **Technician** field is currently empty and the **Call State** is UnAssigned.

- Click on **Assign**.

5. " The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 3
6. Complete the Call Assignment information and click **Save** when done.

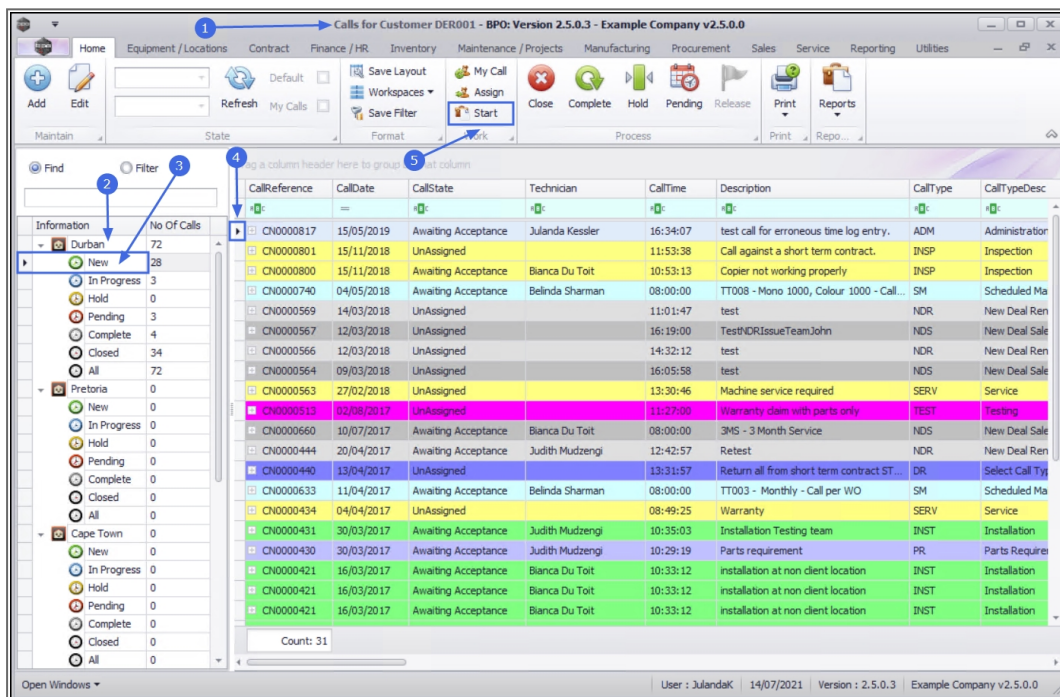
Help v2.5.0.14 - Pg 15 - Printed: 25/06/2024



## START WORK

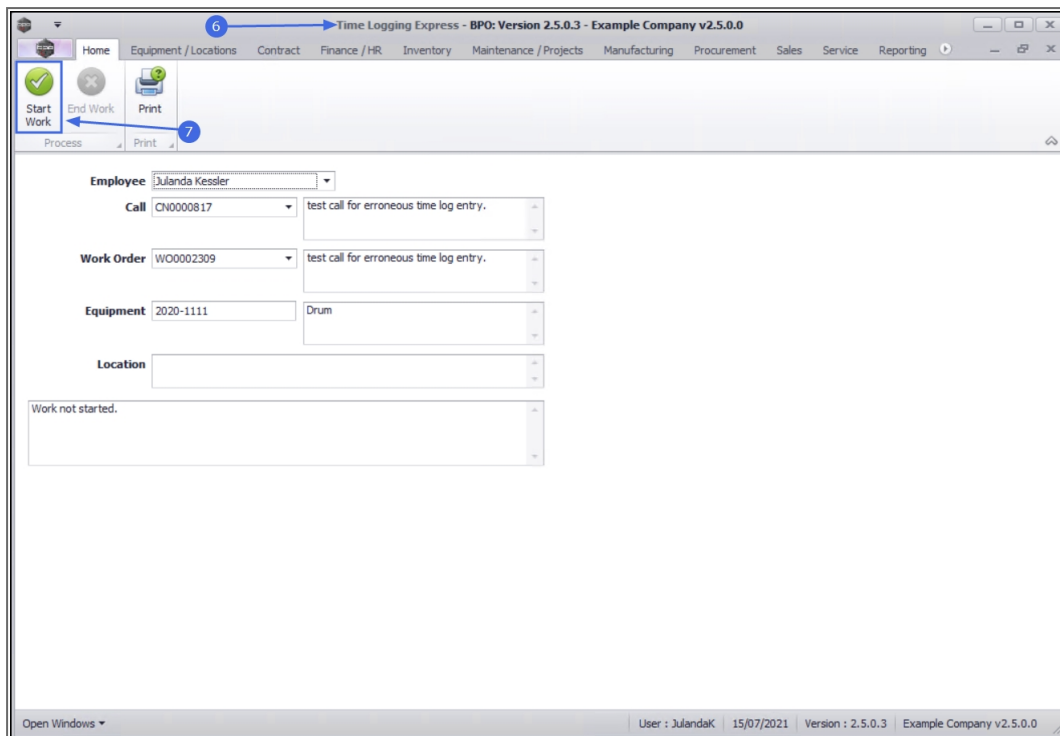
Use the **Start Work** feature to **Start** and **End** work on Calls that you are working on. A Call must be in the **New** status to Start Work, and will then move to the **In Progress** status where you can continue the process until End Work.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site**.
  - The example has **Durban** selected.
3. Ensure that the **Call Status** is set to **New**.
4. Click on the **row** of the Call you wish to start work on.
5. Click on **Start**.



| CallReference | CallDate   | CallState           | Technician      | CallTime | Description                               | CallType | CallTypeDesc   |
|---------------|------------|---------------------|-----------------|----------|---|----------|----------------|
| CH0000817     | 15/05/2019 | Awaiting Acceptance | Julanda Kessler | 16:34:07 | test call for erroneous time log entry.   | ADM      | Administration |
| CH0000801     | 15/11/2018 | UnAssigned          |                 | 11:53:38 | Call against a short term contract.       | INSP     | Inspection     |
| CH0000800     | 15/11/2018 | Awaiting Acceptance | Bianca Du Toit  | 10:53:13 | Copier not working properly               | INSP     | Inspection     |
| CH0000740     | 04/05/2018 | Awaiting Acceptance | Belinda Sharman | 08:00:00 | TT008 - Mono 1000, Colour 1000 - Call...  | SM       | Scheduled Ma   |
| CH0000569     | 14/03/2018 | UnAssigned          |                 | 11:01:47 | test                                      | NDR      | New Deal Ren   |
| CH0000567     | 12/03/2018 | UnAssigned          |                 | 16:19:00 | TestNDRIssueTeamJohn                      | NDS      | New Deal Sale  |
| CH0000566     | 12/03/2018 | UnAssigned          |                 | 14:32:12 | test                                      | NDR      | New Deal Ren   |
| CH0000564     | 09/03/2018 | UnAssigned          |                 | 16:05:58 | test                                      | NDS      | New Deal Sale  |
| CH0000563     | 27/02/2018 | UnAssigned          |                 | 13:30:46 | Machine service required                  | SERV     | Service        |
| CH0000513     | 02/08/2017 | UnAssigned          |                 | 11:27:06 | Warranty claim with parts only            | TEST     | Testing        |
| CH0000660     | 10/07/2017 | Awaiting Acceptance | Bianca Du Toit  | 08:00:00 | 3MS - 3 Month Service                     | NDS      | New Deal Sale  |
| CH0000444     | 20/04/2017 | Awaiting Acceptance | Judith Mudzengi | 12:42:57 | Retest                                    | NDR      | New Deal Ren   |
| CH0000440     | 13/04/2017 | UnAssigned          |                 | 13:31:57 | Return all from short term contract ST... | DR       | Select Call Ty |
| CH0000633     | 11/04/2017 | Awaiting Acceptance | Belinda Sharman | 08:00:00 | TT003 - Monthly - Call per WO             | SM       | Scheduled Ma   |
| CH0000434     | 04/04/2017 | UnAssigned          |                 | 08:49:25 | Warranty                                  | SERV     | Service        |
| CH0000431     | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:35:03 | Installation Testing team                 | INST     | Installation   |
| CH0000430     | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:29:19 | Parts requirement                         | PR       | Parts Require  |
| CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation   |
| CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation   |
| CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation   |

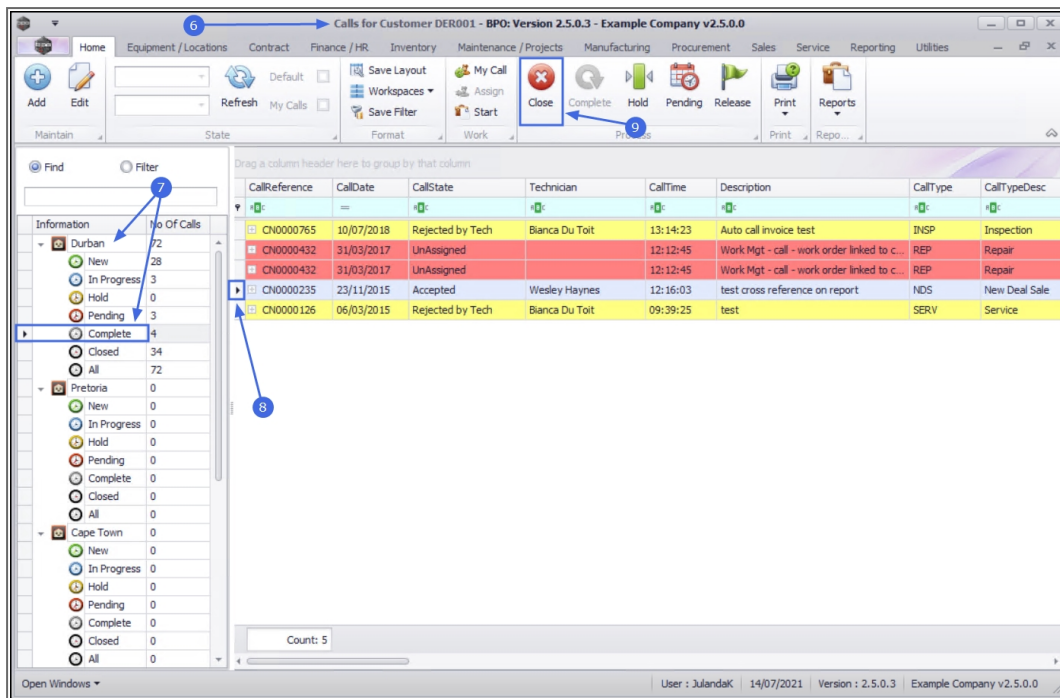
6. " The Time Logging Express screen will be displayed. " on page 2
7. Complete the Time logging screen and click on **Start Work**.



## CLOSE A CALL

When a call has been closed, it cannot be re-opened, and can only be viewed. You will receive a notification when trying to close a Call that have outstanding items, such as billable items not yet invoiced, linked to the call.

1. From the ***Calls for Customer [customer code]*** screen,
2. Select the ***Site*** and ***Call Status***.
  - The example has ***Durban*** selected and the status has been set to ***Complete***.
3. Click on the ***row*** of the Call you wish to close.
4. Click on ***Close***.



5. When you receive the **Input Validation** message to confirm;

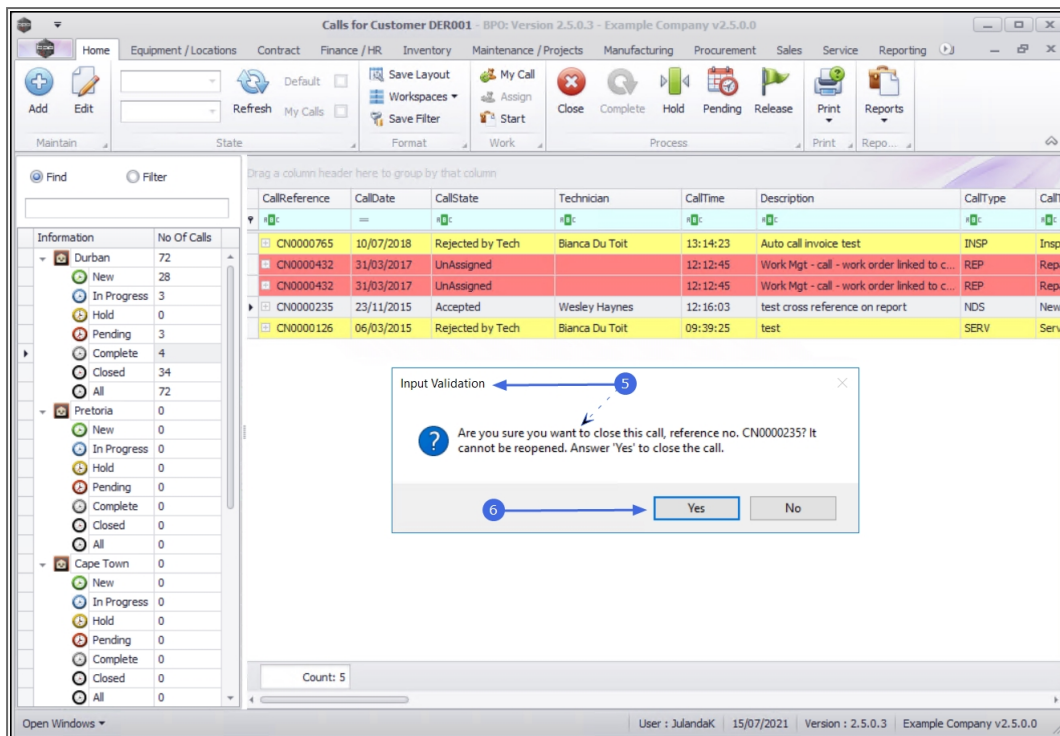
- **Are you sure you want to close this call, reference no. [call ref number]? It cannot be reopened. Answer 'Yes' to close the call.**

6. Click on **Yes**.



For a detailed handling of this topic refer to Calls - Close a Call

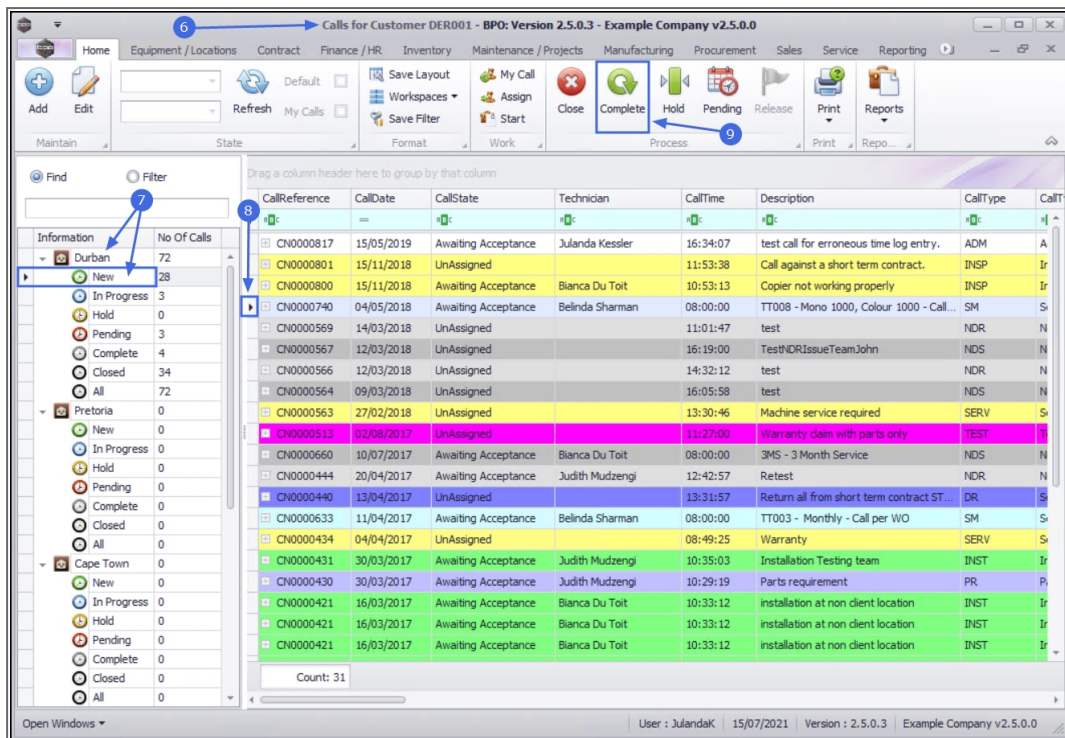




## COMPLETE A CALL

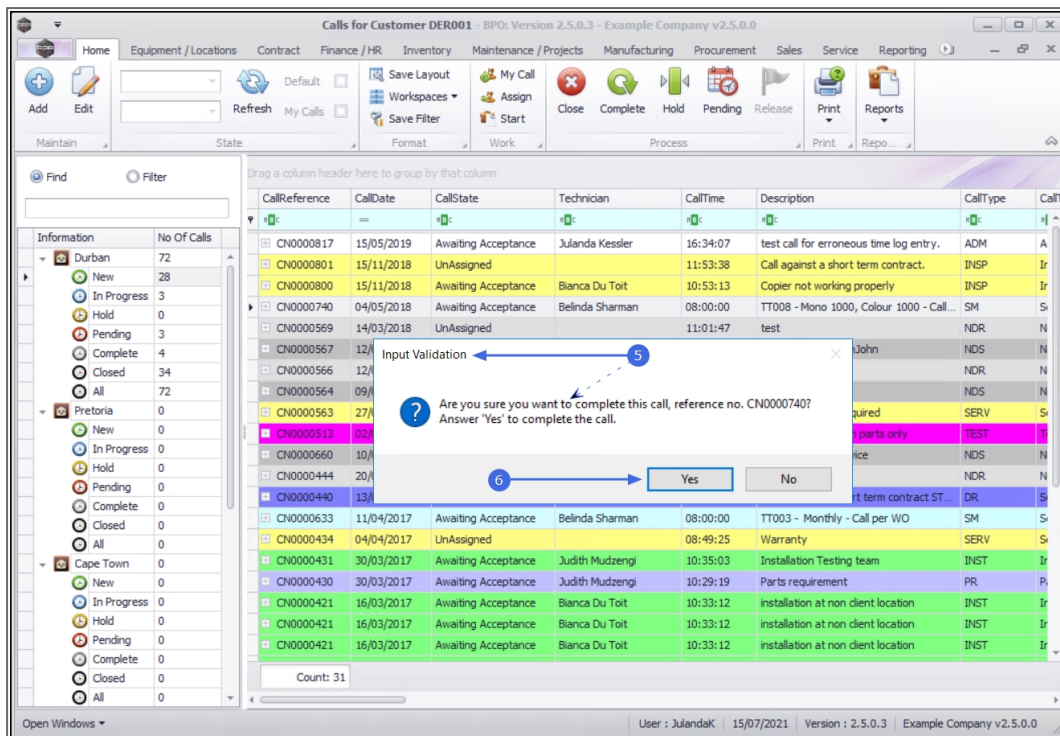
Once the Technician has completed the work required, the call can be set to **Completed**.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site** and **Call Status**.
  - The example has **Durban** selected and the call status is **New**.
3. Click on the **row** of the Call you wish to complete.
4. Click on **Complete**.



| CallReference | CallDate   | CallState           | Technician      | CallTime | Description                               | CallType | CallT |
|---------------|------------|---------------------|-----------------|----------|---|----------|-------|
| CN0000817     | 15/05/2019 | Awaiting Acceptance | Julanda Kessler | 16:34:07 | test call for erroneous time log entry.   | ADM      | A     |
| CN0000801     | 15/11/2018 | UnAssigned          |                 | 11:53:38 | Call against a short term contract.       | INSP     | Ir    |
| CN0000800     | 15/11/2018 | Awaiting Acceptance | Bianca Du Toit  | 10:53:13 | Copier not working properly               | INSP     | Ir    |
| CN0000740     | 04/05/2018 | Awaiting Acceptance | Belinda Sharman | 08:00:00 | TT008 - Mono 1000, Colour 1000 - Call...  | SM       | Si    |
| CN0000569     | 14/03/2018 | UnAssigned          |                 | 11:01:47 | test                                      | NDR      | N     |
| CN0000567     | 12/03/2018 | UnAssigned          |                 | 16:19:00 | TestNDRIssueTeamJohn                      | NDS      | N     |
| CN0000566     | 12/03/2018 | UnAssigned          |                 | 14:32:12 | test                                      | NDR      | N     |
| CN0000564     | 09/03/2018 | UnAssigned          |                 | 16:05:58 | test                                      | NDS      | N     |
| CN0000563     | 27/02/2018 | UnAssigned          |                 | 13:30:46 | Machine service required                  | SERV     | Si    |
| CN0000513     | 02/08/2017 | UnAssigned          |                 | 11:27:00 | Warranty claim with parts only            | TEST     | Tr    |
| CN0000660     | 10/07/2017 | Awaiting Acceptance | Bianca Du Toit  | 08:00:00 | 3MS - 3 Month Service                     | NDS      | N     |
| CN0000444     | 20/04/2017 | Awaiting Acceptance | Judith Mudzengi | 12:42:57 | Retest                                    | NDR      | N     |
| CN0000440     | 13/04/2017 | UnAssigned          |                 | 13:31:57 | Return all from short term contract ST... | DR       | Si    |
| CN0000633     | 11/04/2017 | Awaiting Acceptance | Belinda Sharman | 08:00:00 | TT003 - Monthly - Call per WO             | SM       | Si    |
| CN0000434     | 04/04/2017 | UnAssigned          |                 | 08:49:25 | Warranty                                  | SERV     | Si    |
| CN0000431     | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:35:03 | Installation Testing team                 | INST     | Ir    |
| CN0000430     | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:29:19 | Parts requirement                         | PR       | P     |
| CN0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Ir    |
| CN0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Ir    |
| CN0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Ir    |

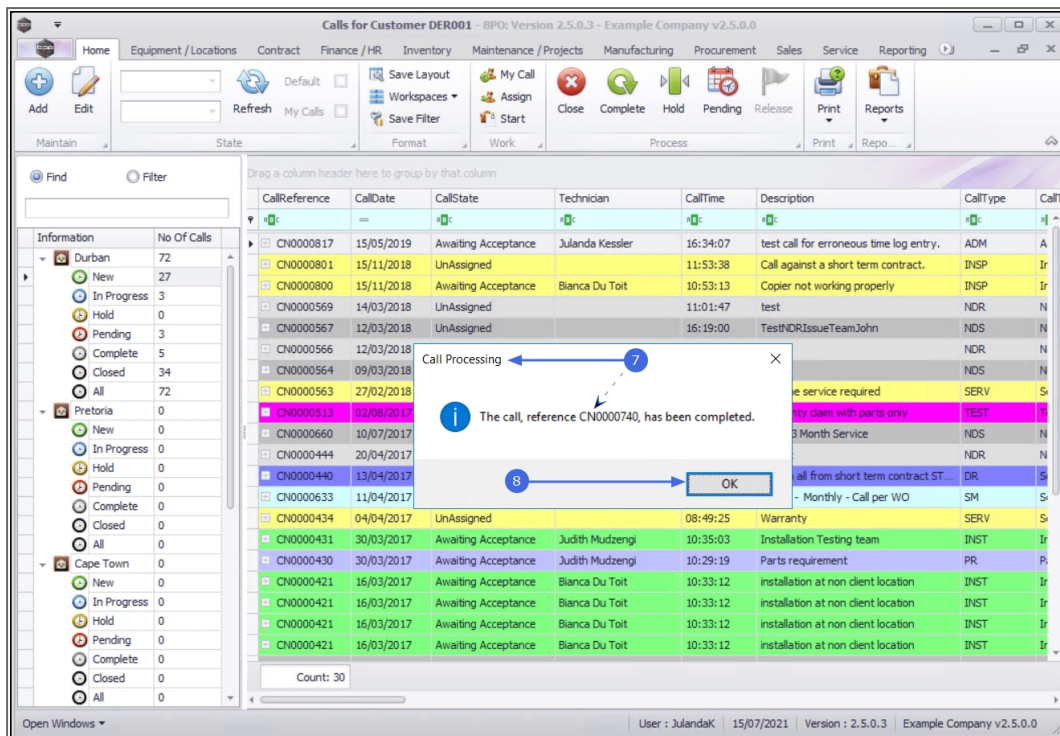
5. When you receive the **Input Validation** message to confirm;
  - **Are you sure you want to complete this call, reference no. [call ref number]? Answer 'Yes' to complete the call.**
6. Click on **Yes**.



7. Next you will receive the **Call Processing** message to confirm that;
  - **The call, reference [call ref number], has been completed.**
8. Click on **OK**.



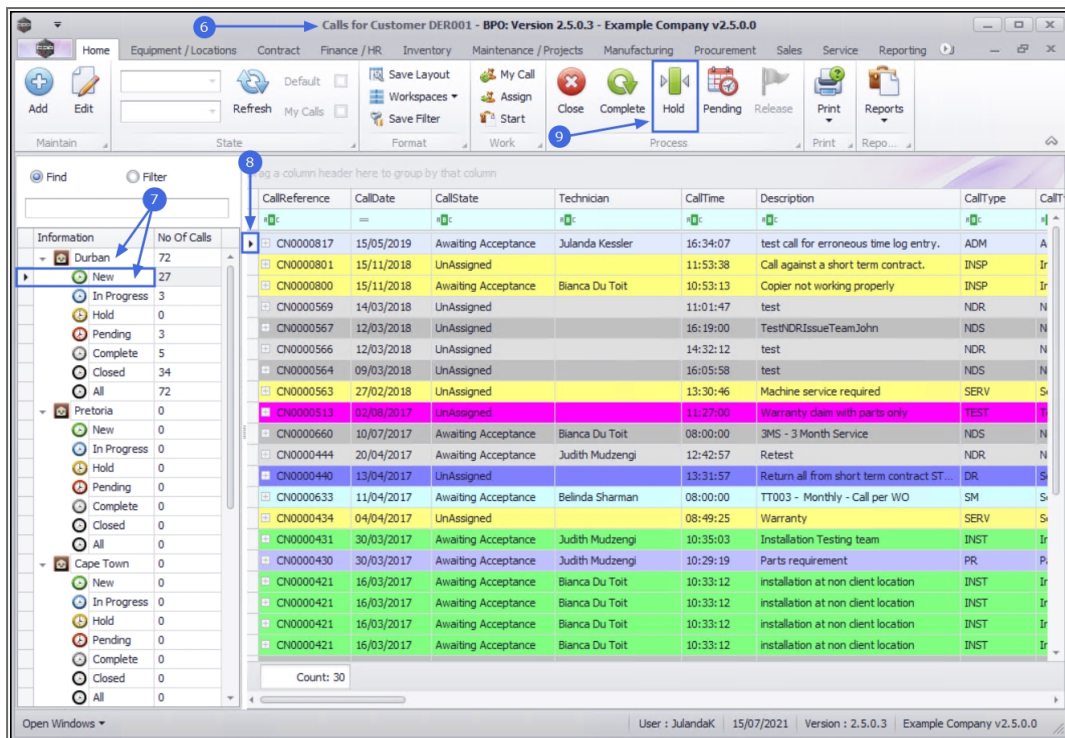
For a detailed handling of this topic refer to Calls - Complete a Call



## PLACE CALL ON HOLD

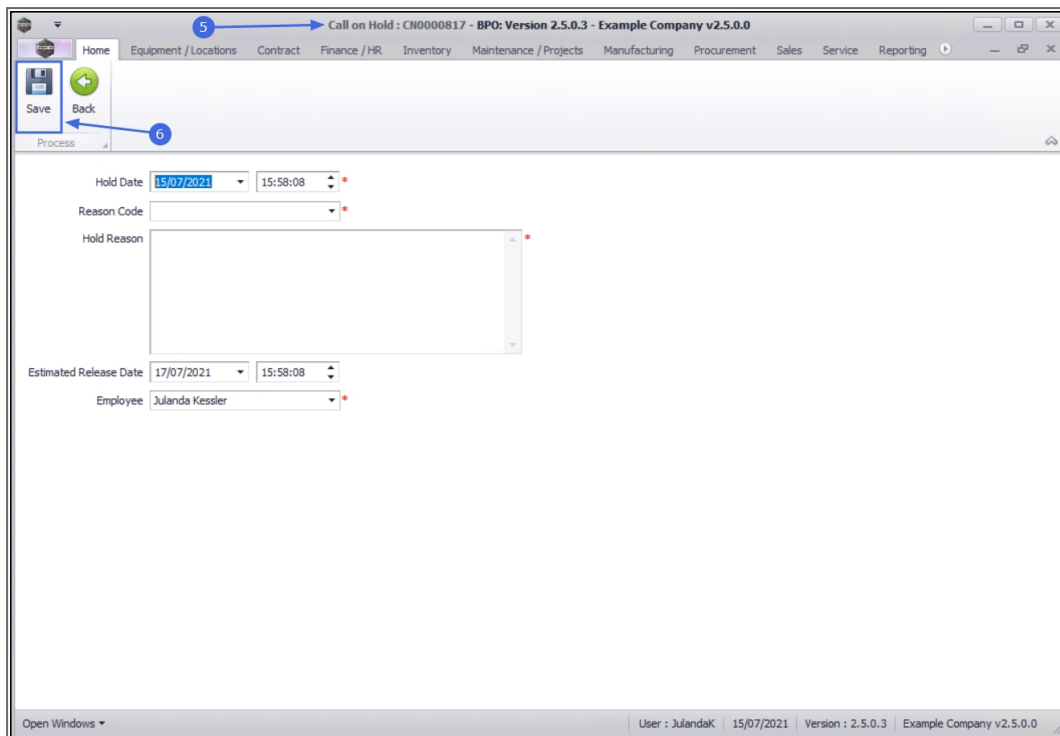
Placing a call on **Hold** will result in work being stopped to resolve a client/customer issue e.g there is no one available on site to allow a technician access to a location, or the client is awaiting approval from their finance department before a new part request can be fitted. The [SLA Monitor](#) will "pause" until the call is **Released from Hold**.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site**.
  - The example has **Durban** selected and the call status is **New**.
3. Click on the **row** of the Call you wish to place on hold.
4. Click on **Hold**.



5. The **Call on Hold** : [call ref number] screen will be displayed.
6. Complete the hold information for the call and click on **Save**.

For a detailed handling of this topic refer to **Calls - Place on Hold**



## MOVE TO PENDING

Placing a Call in a **Pending** status differs from placing a call on Hold. A call is placed in a pending status when work needs to be stopped to resolve a company issue, e.g. lack of stock to complete the work. The [SLA Monitor](#) will continue to run.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site**.
  - The example has **Durban** selected.
3. The **Call Status** must be in either the **New** or **In Progress** status.
4. Click on the **row** of the Call you wish to place in pending.
5. Click on **Pending**



1 → Calls for Customer DER001 - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

2 → Filter

3 → Pending

4 → CallReference

5 → Pending

| Information | No Of Calls | CallReference | CallDate   | CallState           | Technician      | CallTime | Description                               | CallType | CallTypeDesc  |
|-------------|-------------|---------------|------------|---------------------|-----------------|----------|---|----------|---------------|
| Durban      | 72          | CH0000801     | 15/11/2018 | UnAssigned          |                 | 11:53:38 | Call against a short term contract.       | INSP     | Inspection    |
| New         | 26          | CH0000800     | 15/11/2018 | Awaiting Acceptance | Bianca Du Toit  | 10:53:13 | Copier not working properly               | INSP     | Inspection    |
| In Progress | 3           | CH0000569     | 14/03/2018 | UnAssigned          |                 | 11:01:47 | test                                      | NDR      | New Deal Re   |
| Hold        | 1           | CH0000567     | 12/03/2018 | UnAssigned          |                 | 16:19:00 | TestNDRIssueTeamJohn                      | NDS      | New Deal Sa   |
| Pending     | 3           | CH0000566     | 12/03/2018 | UnAssigned          |                 | 14:32:12 | test                                      | NDR      | New Deal Re   |
| Complete    | 5           | CH0000564     | 09/03/2018 | UnAssigned          |                 | 16:05:58 | test                                      | NDS      | New Deal Sa   |
| Closed      | 34          | CH0000563     | 27/02/2018 | UnAssigned          |                 | 13:30:46 | Machine service required                  | SERV     | Service       |
| All         | 72          | CH0000513     | 02/08/2017 | UnAssigned          |                 | 11:27:00 | Warranty claim with parts only            | TEST     | Testing       |
| Pretoria    | 0           | CH0000660     | 10/07/2017 | Awaiting Acceptance | Bianca Du Toit  | 08:00:00 | 3MS - 3 Month Service                     | NDS      | New Deal Sa   |
| New         | 0           | CH0000444     | 20/04/2017 | Awaiting Acceptance | Judith Mudzengi | 12:42:57 | Retest                                    | NDR      | New Deal Re   |
| In Progress | 0           | CH0000440     | 13/04/2017 | UnAssigned          |                 | 13:31:57 | Return all from short term contract ST... | DR       | Select Call T |
| Hold        | 0           | CH0000633     | 11/04/2017 | Awaiting Acceptance | Belinda Sharmen | 08:00:00 | TT003 - Monthly - Call per WO             | SM       | Scheduled M   |
| Pending     | 0           | CH0000434     | 04/04/2017 | UnAssigned          |                 | 08:49:25 | Warranty                                  | SERV     | Service       |
| Complete    | 0           | CH0000431     | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:35:03 | Installation Testing team                 | INST     | Installation  |
| Closed      | 0           | CH0000430     | 30/03/2017 | Awaiting Acceptance | Judith Mudzengi | 10:29:19 | Parts requirement                         | PR       | Parts Requir  |
| All         | 0           | CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation  |
| Cape Town   | 0           | CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation  |
| New         | 0           | CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation  |
| In Progress | 0           | CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation  |
| Hold        | 0           | CH0000421     | 16/03/2017 | Awaiting Acceptance | Bianca Du Toit  | 10:33:12 | installation at non client location       | INST     | Installation  |
| Pending     | 0           | CH0000357     | 23/06/2016 | Awaiting Acceptance | Bianca Du Toit  | 10:20:00 | test                                      | NDS      | New Deal Sa   |
| Complete    | 0           |               |            |                     |                 |          |   |          |               |
| Closed      | 0           |               |            |                     |                 |          |   |          |               |
| All         | 0           |               |            |                     |                 |          |   |          |               |

Count: 29

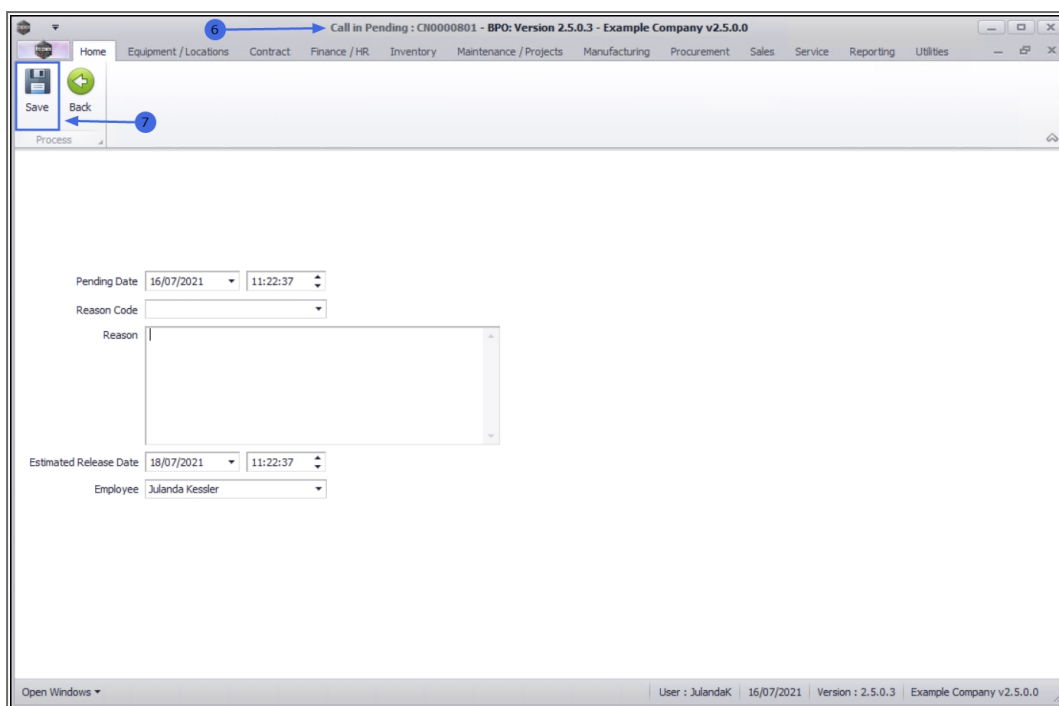
User : JulandaK | 16/07/2021 | Version : 2.5.0.3 | Example Company v2.5.0.0

6. The **Call in Pending** : [call ref number] screen will be displayed.
7. Complete the pending information for the call and click on **Save**.



For a detailed handling of this topic refer to **Calls - Move to Pending Status**

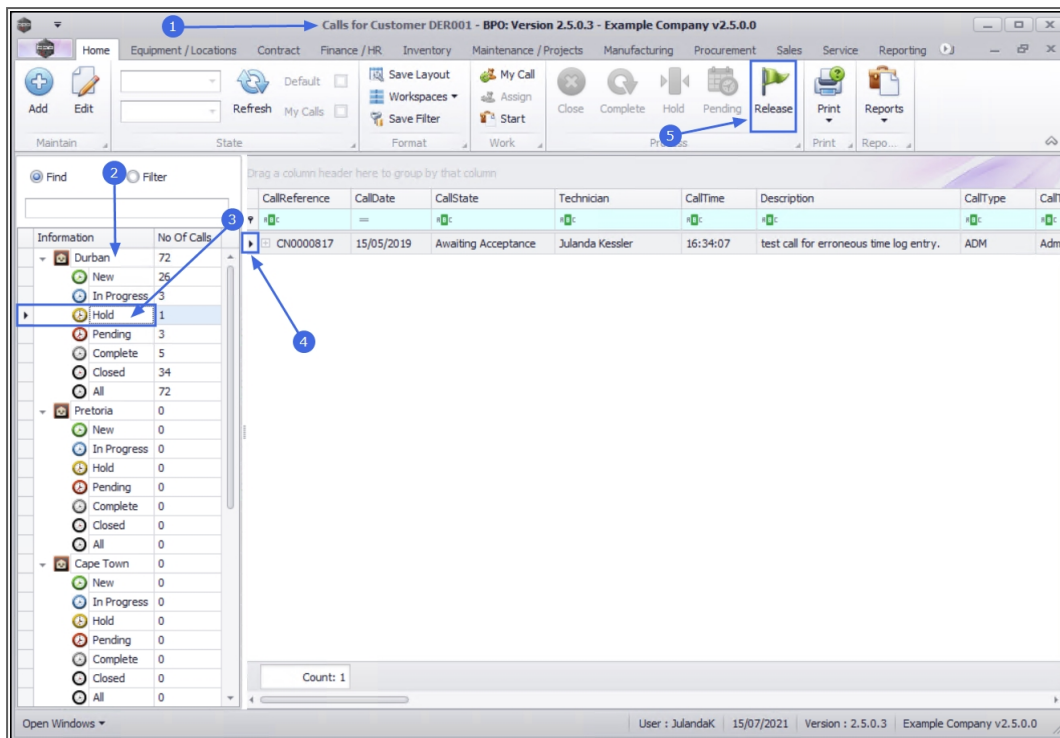




## RELEASE A CALL

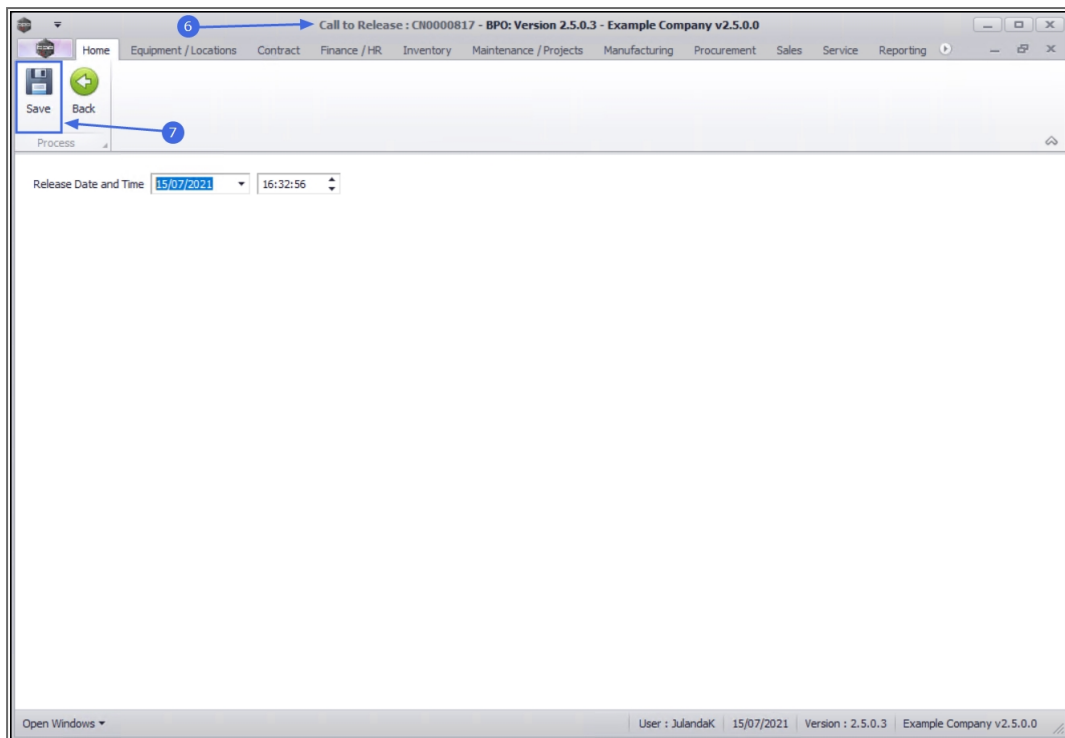
When a call is released, it will move back to the **New** status where it can be re-assigned. When the call is re-assigned, a new work order should be created.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site**.
  - The example has **Durban** selected.
3. Ensure that the **Call Status** has been set to **Hold**.
4. Click on the **row** of the Call you wish to release from hold.
5. Click on **Release**.



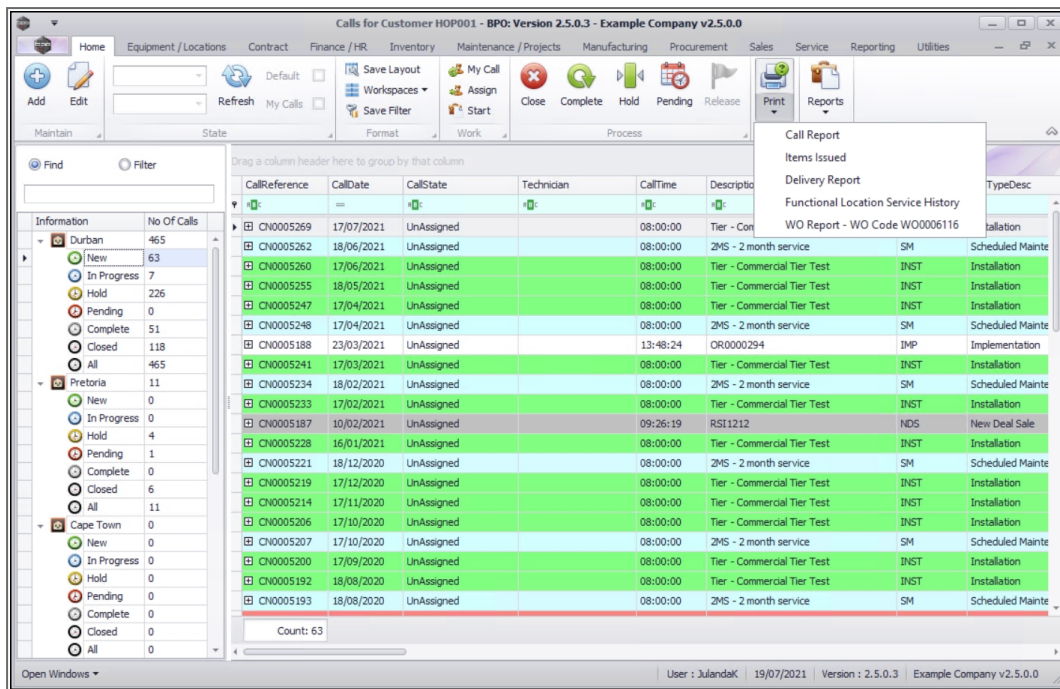
6. The **Call to Release** : [call ref number] screen will be displayed.
7. Complete the release information for the call and click on **Save**.

For a detailed handling of this topic refer to Calls - Release a Call



## PRINT PANEL

You can [Print Call Report](#), [Items Issued History Report](#), [Delivery Report](#), Functional Location [Service History Report](#), or a [Work Order Report](#) for the **Call from the Calls for the Customer screen**, by selecting the **Print** button.



Calls for Customer HOP001 - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Refresh My Calls Save Layout Workspaces Assign Start Close Complete Hold Pending Release Print Reports

Find Filter

Information No Of Calls

- Durban 465
  - New 63
  - In Progress 7
  - Hold 226
  - Pending 0
  - Complete 51
  - Closed 118
  - All 465
- Pretoria 11
  - New 0
  - In Progress 0
  - Hold 4
  - Pending 1
  - Complete 0
  - Closed 6
  - All 11
- Cape Town 0
  - New 0
  - In Progress 0
  - Hold 0
  - Pending 0
  - Complete 0
  - Closed 0
  - All 0

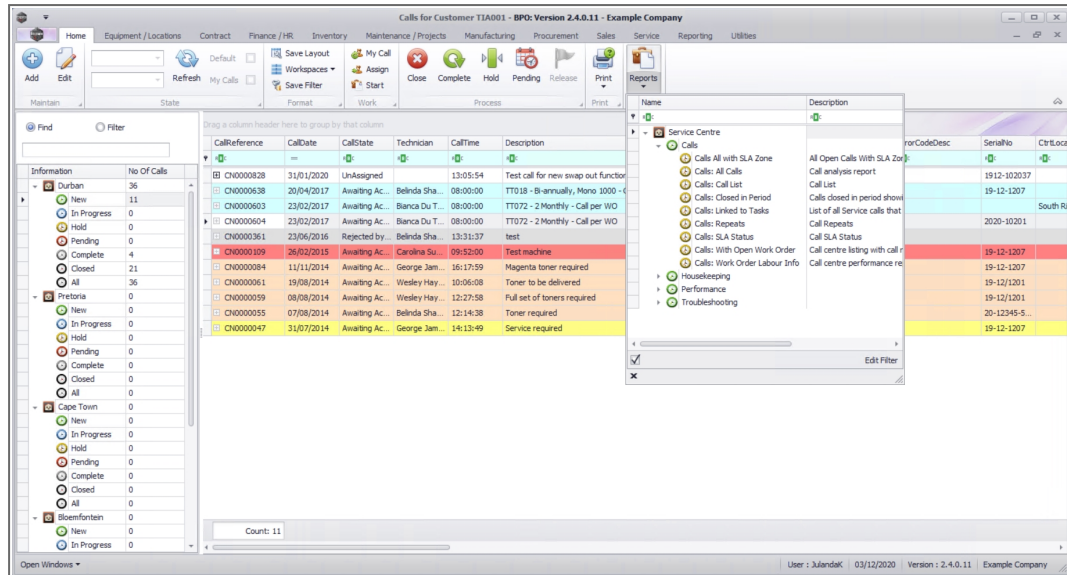
Count: 63

User : JulandaK | 19/07/2021 | Version : 2.5.0.3 | Example Company v2.5.0.0

## REPORTS PANEL

The **Reports** button allow you to print Reports regarding the Service Centre for:

1. **Calls**,
2. **Housekeeping**,
3. **Performance** and
4. **Troubleshooting** on Calls linked to the selected Customer.



Calls for Customer T1A001 - BPO: Version 2.4.0.11 - Example Company

| CallReference | CalDate    | CalState       | Technician     | CallTime | Description                         |
|---------------|------------|----------------|----------------|----------|-------------------------------------|
| CH00000328    | 31/01/2020 | Unassigned     |                | 13:05:54 | Test call for new swap out function |
| CH00000638    | 20/04/2017 | Awaiting Ac... | Belinda Sha... | 08:00:00 | TT018 - Bi-annually, Mono 1000 - C  |
| CH00000603    | 23/02/2017 | Awaiting Ac... | Bianca Du T... | 08:00:00 | TT072 - 2 Monthly - Call per W/O    |
| CH00000604    | 23/02/2017 | Awaiting Ac... | Bianca Du T... | 08:00:00 | TT072 - 2 Monthly - Call per W/O    |
| CH00000361    | 23/06/2016 | Rejected by    | Belinda Sha... | 13:31:37 | test                                |
| CH00000109    | 26/02/2015 | Awaiting Ac... | Carolina Su... | 09:52:00 | Test machine                        |
| CH00000084    | 11/11/2014 | Awaiting Ac... | George Jam...  | 05:17:59 | Magenta toner required              |
| CH00000061    | 19/08/2014 | Awaiting Ac... | Wesley Hay...  | 10:36:08 | Toner to be delivered               |
| CH00000059    | 08/08/2014 | Awaiting Ac... | Wesley Hay...  | 12:27:58 | Full set of toners required         |
| CH00000055    | 07/08/2014 | Awaiting Ac... | Belinda Sha... | 12:14:38 | Toner required                      |
| CH00000047    | 31/07/2014 | Awaiting Ac... | George Jam...  | 14:13:49 | Service required                    |

Count: 11

User: Julandak 03/12/2020 Version: 2.4.0.11 Example Company

MNU.061.022