

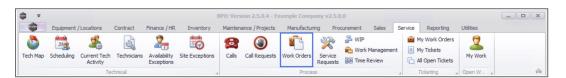
# SERVICE

# **WORK ORDERS - TIME REVIEW**

Time review enables managers to allocate *regular* time logged by employees as *SLA* or *non billable* time. For example, if an employee books **4** hours against a work order, and the manager knows that the task should only require **2** hours to complete, then the manager can allocate **2** hours as Billable or *SLA* hours and the remaining **2** hours as *Non Billable* hours in the Time Review screen.

The <u>Time Review flag</u> must be set to **Yes** in **Configurator**.

Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site* where the work order has been issued.
  - The example has **Durban** selected.
- 3. Ensure that the *Status* has been set to *Open*.
- 4. Select the *row* of the work order you wish to review time for.
- 5. Click on the *Time Review* tile.



#### Work Orders - Time Review

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	· WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2 No	
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		PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3 No	
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		ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	18/01/2022	3 No	
		REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3 No	
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	· WO0006247	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PR.300004
	· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PR300004
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	🗉 WO0006239	PR		Rollers need replacing	No		11/11/2021	3 No	PR300004
	· WO0006238	PR		Test PQ Source Type Work Order	No		14/11/2021	5 No	

#### **INVOICE WORK ORDER**

A work order can be invoiced from the *Time Review* screen.

- 1. From the *Time Note Billed for Work Order code [work order coder]* screen,
- 2. Click on the *row* of the work order you wish to invoice.
- 3. Click on *Invoice WO*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Invoice WO*.



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- 4. The *Add New Customer Invoice* screen will be displayed.
- 5. Complete the Customer Invoice then click on *Save*.

For a detailed handling of this topic refer to Time Review - Invoice Work Order



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- 6. You will return to the *Time Not Billed for Work Order* screen.
- 7. Click on *Back* to return to the *Work Order Listing* screen.

For a detailed handling of this topic refer to Introduction to Invoices



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#### **INVOICE CALL**

- 1. From the *Time Note Billed for Work Order code [work order coder]*screen,
- 2. Click on the *row* of the work order you wish to invoice.
- 3. Click on Invoice Call.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Invoice Call*.



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- 4. The *Add New Customer Invoice* screen will be displayed.
- 5. Complete the Customer Invoice then click on *Save*.

For a detailed handling of this topic refer to Time Review - Invoice Project

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- 6. You will return to the *Time Not Billed for Work Order code* screen.
- 7. Click on *Back* to return to the Work Order Listing screen.

For a detailed handling of this topic refer to Introduction to Invoices

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# **FLAG REVIEWED**

Note on the Time Review flag: Work orders created <u>after</u> the Time Review flag has been set to 'Yes' in the Configurator, will by default display as 'No' in the Billable column, yet all *Regular Hours* will be billed.

- 1. From the *Time Not Billed for Work Order code [work order code]* screen,
- 2. Click on the *row* of the Work Order you wish to review the time for.



- 3. *Scroll* until you can view all the Time columns.
  - Billable: Labour time is displayed as billable or non-billable.
  - **Regular Hours:** The time logged against the work order. (*This field cannot be changed*)
  - **Overtime<sup>1</sup> Hours:** Overtime hours logged against the work order. (*This field cannot be changed*)
  - **SLA Hours:**<sup>2</sup> Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
  - Non Billable Hours:<sup>3</sup> Time allocated to this field will <u>not</u> be billed.
  - Total Hours: = *Regular Hours* + *Overtime Hours* + *SLA Hours+ Non Billable Hours*. (This field cannot be changed)

<sup>3</sup>Adding Non Billable hours will deduct from Regular hours

<sup>&</sup>lt;sup>1</sup>Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.

<sup>&</sup>lt;sup>2</sup>Time allocated to SLA hours will be deducted from Regular Hours. For example 8 Regular Hours booked, will be updated to 7 Regular Hours when you add 1 to the SLA Hours field.



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- 4. *Scroll* right until you can view the *Marked* column.
- 5. The Marked field for the work order will be checked when time is allocated to *SLA and/or Non Billable Hours*.

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															2 SP	19-147M	Magenta to	PART	
															2 SP	919-147Y	Yellow Tone	PART	



- 6. Click on *Flag Reviewed*, when you have completed reviewing the time for the work order.
- 7. When you receive the *Input Validation* message to confirm;
  - Are you sure you want to flag the following items.
- 8. Click on Yes.

Ф ч	-				Time Not	Billed for W	ork Order	code V	NO	0006260 - BF	O: Version 2.	5.0.8 - Examp	le Company v	2.5.	0.8						x
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- 9. The *Is Reviewed* field will now be checked.
- 10. Click on *Save*.



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													· 2	2020-147M	Magenta to	PART	
													· 2	2020-147Y	Yellow tone	PART	
													· 2	500-147K	SP500 Black	PART	
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- 11. When you receive the *Time Review Processing* message to confirm;
  - Time Review processing successfully updated.
- 12. Click on *OK*.

Note that for a record to be <u>removed</u> from this screen, the Work Order has to be *closed*.



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#### **SLA TIME**

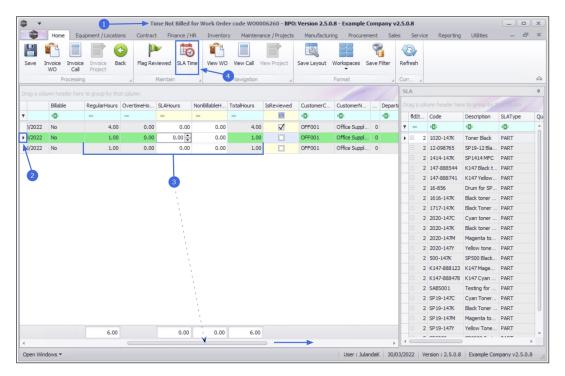
**SLA**<sup>1</sup> is the <u>Service Level Agreement</u> that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. Failing which, the client can receive compensation of a preagreed type (usually also set up in the SLA).

1. From the *Time Not Billed for Work Order code [work order number]* screen will be displayed.

<sup>&</sup>lt;sup>1</sup>This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).



- Click on the *row(s)* to select the Work Order(s) you would like to adjust Regular Hours booked, to SLA Time.
  - Any <u>contract inclusions</u> linked to an item on the selected work order will be displayed in the SLA section.
- Use the *scroll bar* to scroll until you are able to see the hours booked for the Work Order(s).
- 4. Click on *SLA Time* to convert the Regular Hours to SLA Hours.



- 5. When you receive the *Input validation* message to confirm;
  - Are you sure you want to move all the regular hours to SLA for the selected items.
- 6. Click on Yes.



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7. The selected *work order(s)* have been updated and the Regular Hours have been moved or added to the SLA Hours.

**Note** that only Regular Hours have been moved. Overtime and Non-Billable Hours were not affected.

8. Click on *Save* to save the changes.



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	Home	Equipment / Lo	ations	Contract	t Finance /	HR Invent	ory Maintena	ance / Projects	Manufactu	ring Procur	ement	Sales	Se	rvice Reporting	Utilities	- 8	X
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- 9. When you receive the *Time Review Processing* message to confirm; *Time Review processing successfully updated.*
- 10. Click on *OK* to confirm.
- 11. Click on *Back* to return to the Work Order Listing screen.



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# **VIEW WORK ORDER**

- 1. From the *Time Not Billed for Work Order code [work order number]* screen,
- 2. Click on the *row* of the Work Order you wish to view.
- 3. Click on *View WO*.



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												2 K147-888478	K147 Cyan	PART	
												2 SABS001	Testing for	PART	
												2 SP19-147C	Cyan Toner	PART	
												2 SP19-147K	Black Toner	PART	
												2 SP19-147M	Magenta to	PART	
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Count: 3															

- 4. "The Work Order Maintenance screen will be displayed. " on page 2
- 5. From here you can add to or edit the Work Order details, Customer Info, the Required Crafts, Additional Data or the Equipment Info for the work order, or update the work order using the Function and Processing tiles.
- 6. When you have completed making the changes to the maintenance screen, click on *Save*.



· · · · · · · · · · · · · · · · · · ·	Maintain WO - Ref W00006260	- BPO: Version 2.5.0.8 - Exam	ple Company v2.5.	0.8			
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Open Windows 🔻			User : JulandaK	30/03/2022	Version : 2.5.0.8	Example Company v2.5.	.0.8

# **VIEW CALL**

- 1. From the *Time Not Billed for Work Order code [work order number]* screen,
- 2. Click on View Call.



	-	_	]	Time N	lot Billed for V	Vork Order o	ode W0000626	0 - BPO: Vers	sion 2.5.0.8 - I	Example Comp	any v2.	5.0.	.8				
	Horr	e Equipme	nt / Locations	Contract	Finance / HR	Inventory	Maintenance /	Projects M	anufacturing	Procurement	Sales		Service	e Reporting	Utilities	- 6	5 3
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4	WO0006260	-		Jeff Rivers	Jeff Rivers	DRV	-					ę		Code	Description	SLAType	1
	WO0006260	Loan unit re		John Twain	Belinda Sha		Driver Administrati	28/03/2022	No	4.00		-		-	Toner Black	-	
		Loan unit re			Karlien Jessi			29/03/2022		1.00		۲		1020-147K 12-098765	SP19-12 Bla	PART	
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														1616-147K	Black toner		
													-	1717-147K	Black Toner		
														2020-147C	Cyan toner		
														2020-147K	Black toner		
														2020-147M	Magenta to		
													÷ 2	2020-147Y	Yellow tone		
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													2	K147-888478	K147 Cyan	PART	
													- 2	SABS001	Testing for	PART	
													2	SP19-147C	Cyan Toner	PART	
													- 2	SP19-147K	Black Toner	PART	
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ſ	Count: 3									5.00			2	SP19-147Y	Yellow Tone	PART	
										5.00			-			DIDT	
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#### 3. " The Call maintenance screen will be displayed. " on page 2

4. Make the required changes to the call information and click on *Save*.

<b>•</b> •	3	Call maintena	ance : Call ref	CN0005304	BPO: Versio	n 2.5.0.8 - Ex	xample (	Company v	2.5.0.8					
Home Equipmen	nt / Locations Contra	ict Finance / HR	Inventory	Maintenance	/ Projects	Manufacturin	g Pro	curement	Sales	Service	Reporting	Utilities	-	8
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Work Orders 1	Address	674 Nightwish Ave Forest Hills	<i>р</i>	A	Location					-				
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Work In Progress	Call Type	Repair		<b>*</b> *	Invoice Re									
	Error Code			-	Order Ref	erence								
Notes	Description	Loan unit required being repaired	while main unit is	*										
	Call Date Time	15/03/2022	▼ 10:30:03	\$										
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