



SERVICE

CALLS - MY CALLS

A new call can be assigned to the user who is currently logged on to BPO, by clicking on the **My Call** button.

Calls can be filtered by selecting the My Calls check box.

Ribbon Access: Service > Calls

- 1. The *Call Listing* screen will be displayed.
- 2. Select the *Site* and *Status*.
 - The example has *Durban* as the site and *New* as status selected.
- 3. Click on the *row* of the *call* you wish to *assign* to *yourself*.

MY CALL

4. Click on the *My Call* button.

Note that the Call State for the selected Call is *UnAssigned* and the Technician column is empty.



Calls - My Calls

| ¢ , | - | | 1 | Call Li | sting - BPO: Version 2.5 | i.0.4 - Example Compa | ny v2.5.0.0 | | (| _ D X |
|----------|------------------------------|------------------------------|----------------------|---|---|-----------------------|----------------|--------------------------------------|--------------|--------------|
| | Home Equi | pment / Locations | Contract Finan | ce/HR Inv | entory Maintenance / | Projects Manufacturin | g Procureme | nt Sales Service Reporting I | Utilities | _ & × |
| Add Main | 22/07 Edit 18/01 | /2021 - /2022 - F Stab | Cefresh My Calls | Worksp Save Li Worksp Save Fi Forma | ayout acces Assign liter Work | Close Complete H | old Pending | Release Print Reports | | \$ |
| 0 | | | 3 | | bu that column | | | | | |
| Fir | nd OFI | ter | a ag a column neader | C ID I | College to | To de la face | o. 177 | Description | 0.17 | 0.07 |
| | | 2 | Caliketerence | CallDate | Calistate | Technician | Calltime | Description | Call ype | Call ypeDes |
| Info | rmation | No Of Calls | | - | *Bc | 4 🖬 C | a 🖬 c | REC | n El c | *@c |
| 1110 | Durban | 20 | ► CN0005296 | 05/11/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | New | 25 | | 29/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | In Progress | 2 | | 26/10/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | (b) Hold | 0 | | 22/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | Pending | 1 | | 16/10/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | Complete | 1 | | 15/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | Closed | 0 | | 08/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | 29 | | 01/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| _ + I | Pretoria | 0 | | 24/09/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| - P 4 | Cape Town | 0 | E CN0005286 | 17/09/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| _ ^ I | Bloemfontein | 0 | | 16/09/2021 | Awaiting Acceptance | Theo Peterson | 08:00:00 | Tier - Commercial Tier Test | INST | Installation |
| _ + I | A New Test Site | 0 | | 15/09/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | | | | 10/09/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | | 03/09/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | | 27/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | | 26/08/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | | | | 20/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | | 17/08/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | | | | 17/08/2021 | UnAssigned | | 08:00:00 | Tier - Commercial Tier Test | INST | Installation |
| | | | | 13/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | Count: 25 | | | | | | | |
| | | | 4 | | | | | | | • |
| Open V | Vindows 🔻 | | | | | | User : Julanda | K 18/01/2022 Version : 2.5.0.4 E | xample Compa | any v2.5.0.0 |

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



Calls - My Calls

| Add Mair | 22/07/ Edit 18/01/ | /2021 • /2022 • | Refresh My Calls | Save L | ayout 🚜 My Call baces 🕶 🍇 Assign ilter 🍄 Start t Work | Close Complete Ho | Ad Pending | Release Print Reports | | 0 |
|------------|-----------------------|--------------------|-----------------------|--------------------------|--|--|--------------|--------------------------------------|----------|--------------|
| 0 5 | nd O Eile | har | Drag a column head | | | | | | | |
| e n | | | CalReference | CallDate | CallState | Technician | CallTime | Description | CallType | CallTypeDe |
| | | | Υ 8 □ C | = | 10c | 100 | 8 0 0 | ADC | 10c | 100 |
| Info | ormation | No Of Calls | ► EL CN0005296 | 05/11/2021 | | | 08.00.00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| - | 💿 Durban | 29 | | 29/10/2021 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | New | 25 | E CN0005294 | 26/10/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | In Progress | 2 | E CN0005293 | 22/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | () Hold | 0 | E CN0005292 | 16/10/2021 | | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | Pending | 1 | E CN0005290 | 15/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | Complete | 1 | | t Validation | 5 | | × | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | 29 | E CN000 | | | | | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| 1 | Pretoria | 0 | E CN000 | _ | Ľ. | | | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | Cape Town | 0 | | ? This call, ownershi | CN0005296, is in status | New. Do you still want | to take | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| 1 | Bloemfontein | 0 | E CN000 | | P. | | | Tier - Commercial Tier Test | INST | Installation |
| | A New Test Site | 0 | | | | | | 2MS - 2 month service | SM | Scheduled |
| | | | E CN000 | | 6 | Yes | No | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | E CN000 | | | | | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | E CN0005281 | 27/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | | 26/08/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | | | | 20/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | | 17/08/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| | | | | 17/08/2021 | UnAssigned | | 08:00:00 | Tier - Commercial Tier Test | INST | Installation |
| | | | | 13/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| | | | Count: 2 | 5 | | | | | | |

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



Calls - My Calls

| Home I | Equipment / Locat | ions | Contract Finar | nce / HR Inv | entory Maintenance / | Projects Manufacturin | g Procureme | nt Sales Service Reporting | Utilities | - 8 3 |
|------------------------------|----------------------------|-------|----------------|--------------------------------------|--|-------------------------|-------------|---------------------------------------|-----------|--------------|
| dd Edit 18 | 2/07/2021 • 8/01/2022 • | Re | fresh My Calls | Worksp | ayout 🚜 My Call baces 🕶 🎿 Assign ilter 🍄 Start | Close Complete H | old Pending | Release Print Reports | | |
| Maintain 🔒 | 5 | State | | J Forma | t " Work " | Proc | ess | A Print A Repo A | | |
| Find (| Filter | | | r here to group | | | | | | |
| | | - I | CallReference | CallDate | CallState | Technician | CallTime | Description | CallType | CallTypeD |
| | | | 9 HIC | - | (); | 10c | #DC | ×0: | HEC. | * O C |
| Information | No Of Calls | | E CN0005296 | 05/11/2021 | Awaiting Acceptance | Julanda Kessler | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| 👻 💽 Durban | 29 | * | E CN0005295 | 29/10/2021 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| New | 25 | | E CN0005294 | 25/10/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month cervice | SM | Scheduled |
| In Progre | ess 2 | | E CN0005294 | 20/10/2021 | UnAssigned | | 08:00:00 | RathRinMaint - Rathroom Rin Maintena | SM | Scheduled |
| (b) Hold | 0 | | E CN0005293 | 16/10/2021 | UnAssigned | | 08:00:00 | 2MC 2 menth service | SM | Cabadulad |
| Pending | 1 | | E CN0005292 | 16/10/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | 214 | Scheduled |
| Complete | e 1 | | E CN0005290 | 15/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| Closed | 0 | | | Processing < | | | ~ | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| _ O AI | 29 | | | | 1.1 | | | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| Pretoria | 0 | | | BathBinMaint - Bathroom Bin Maintena | | | | | | Scheduled |
| New | 0 | | | U Owners | mp of call, reference cr | 10000290, has been such | Lessiui. | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| In Progre | ess 0 | | | | | | | Tier - Commercial Tier Test | INST | Installation |
| Hold | 0 | | E CN00052 | | - | | | 2MS - 2 month service | SM | Scheduled |
| Pending | 0 | | | | 8— | > | OK | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| Complete | e U | | CN00052 | 03/03/2021 | Onwasigned | | 00.00.00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| Closed | 0 | | E CN0005281 | 27/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena. | SM | Scheduled |
| Come Terre | 0 | | E CN0005280 | 26/08/2021 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled |
| Cape Town | 0 | | E CN0005279 | 20/08/2021 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| In Progra | ecc 0 | | E CN0005279 | 17/09/2021 | UnAccigned | | 09:00:00 | 2MS - 2 month ceruice | SM | Scheduled |
| () Hold | 0 | | E CN0005278 | 17/08/2021 | UnAssigned | | 08:00:00 | ZHS - 2 month service | INCT | Testellation |
| Pending | 0 | | | 17/08/2021 | UNASSIGNED | | 08:00:00 | ner - Commercial Her Test | IIVST | Installation |
| Complete | e 0 | | t CN0005276 | 13/08/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduled |
| O Closed | 0 | | Count: 25 | | | | | | | |
| - | - | | | | | | | | | |

 The call has now been *assigned* to you (the person currently logged on to BPO2).

| Home For | inment /locati | ione | Contract Einan | ce / HP Tou | entory Maintenance / | Projecte Manufacturing | Progurama | ot Salar Sarvice Deporting I | Hiting | _ # |
|---------------|----------------------|------|----------------|-------------|---|------------------------|-----------|--|--------------|--------------|
| Add Edit 18/0 | 7/2021 - 1/2022 - | Re | fresh My Calls | Save Li | ayout baces • ilter t Work Work a | Close Complete Hol | d Pending | Release Print Reports | Junues | |
| Find O F | ilter | | | | by that column 🧕 | | | | | |
| | | . | CallReference | CallDate | CallState | Technician | CallTime | Description | CallType | CallTypeD |
| | | | 9 HCC | - | 10: | | a 🗖 c | | # D C | * D c |
| Information | No Of Calls | | E CN0005296 | 05/11/2021 | Awaiting Acceptance | Julanda Kessler | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduler |
| 👻 🔯 Durban | 29 | * | E CN0005295 | 29/10/2021 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduler |
| New | 25 | | E CN0005294 | 26/10/2021 | | | 08:00:00 | 2MS - 2 month service | SM | Scheduler |
| In Progress | 2 | | E CN0005293 | 22/10/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduler |
| () Hold | 0 | | E CN0005292 | 16/10/2021 | | | 08:00:00 | 2MS - 2 month service | SM | Schedule |
| Pending | 1 | | E CN0005292 | 15/10/2021 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| Complete | 1 | | E CN0005289 | 08/10/2021 | UnAssigned | | 08.00.00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| Q All | 29 | | E CN0005288 | 01/10/2021 | UnAssigned | | 08-00-00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| - Pretoria | 0 | | E CN0005287 | 24/09/2021 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| New | 0 | | E CN0005286 | 17/09/2021 | UnAssigned | | 08.00.00 | BathBinMaint - Bathroom Bin Maintena | SM | Scheduler |
| In Progress | 0 | | E CN0005285 | 16/09/2021 | | Theo Paterson | 08:00:00 | Tier - Commercial Tier Test | INST | Installatio |
| 🚯 Hold | 0 | | E CN0005284 | 15/09/2021 | UnAssigned | Theo Peterson | 08:00:00 | 2MS - 2 month service | SM | Schedule |
| Pending | 0 | | E CN0005283 | 10/09/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| Complete | 0 | U | E CN0005283 | 03/09/2021 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| Closed | 0 | | E CN0005282 | 27/09/2021 | UnAssigned | | 08-00-00 | RathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| | 0 | | E CN0005280 | 26/08/2021 | UnAssigned | | 08-00-00 | 2MS - 2 month service | SM | Schedule |
| Cape Town | 0 | | E CN0005200 | 20/08/2021 | UnAssigned | | 08-00-00 | BathBinMaint - Bathroom Bin Maintena | SM | Schedule |
| In Progress | 0 | | E CN0005279 | 17/09/2021 | UnAssigned | | 08-00-00 | 2MS - 2 month carvica | SM | Schedula |
| (A) Hold | 0 | | E CN0005278 | 17/09/2021 | UnAssigned | | 08.00.00 | Tion - Commercial Tion Test | TNCT | Installatio |
| Pending | 0 | | EL CN0005276 | 13/08/2021 | UnAssigned | | 08-00-00 | RathBinMaint - Bathroom Bin Maintena | SM | Schedula |
| O Complete | 0 | | E CN0003276 | 15/06/2021 | onwaagned | | 00.00.00 | bacionimante - bacil com bir Mainteria | 311 | sciedule |
| Closed | 0 | | Count: 25 | | | | | | | |
| 🖸 All | 0 | - | 4 🤇 | | | | | | | |



VIEW MY CALLS

Filter the Calls on the Call list that have been issued to you, the person logged onto the system.

- 1. From the *Call Listing* screen,
- 2. Click on the *My Calls* check box.
- 3. Click on *Refresh*.
- The Call Listing screen will now filter only the *calls assigned to you* (the person currently logged on to BPO2).



MNU.122.034