

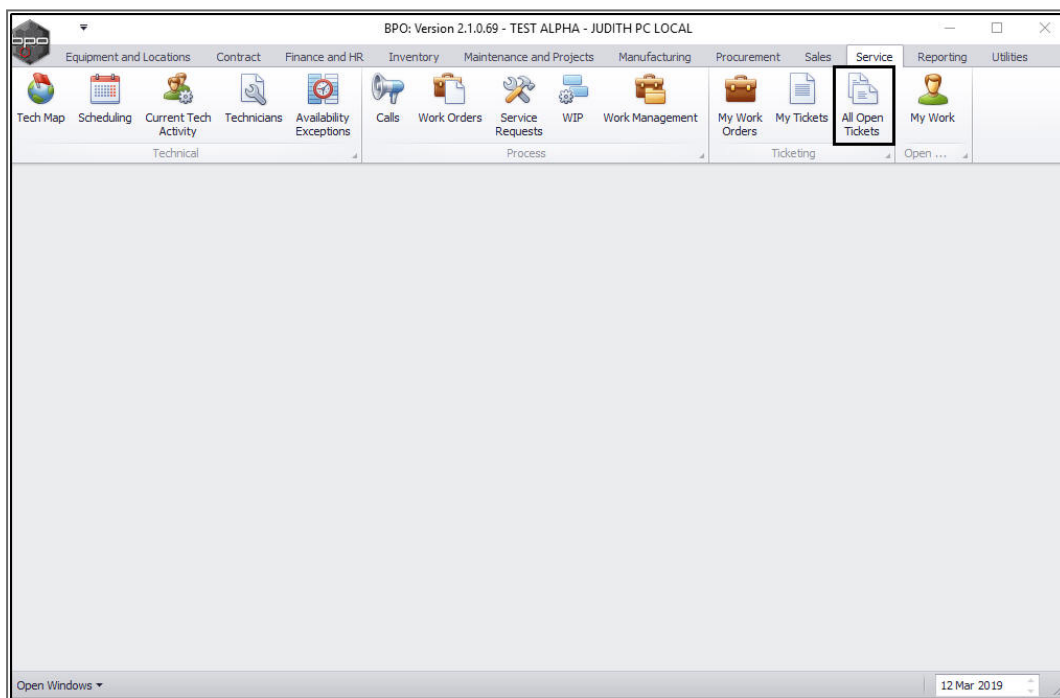
SERVICE

ALL OPEN TICKETS

BPO_Ticketing is an application that gives the user the ability to view and / or work on Calls and / or Projects where they are the owner (responsible person) for the Call or the Project's underlying work order.

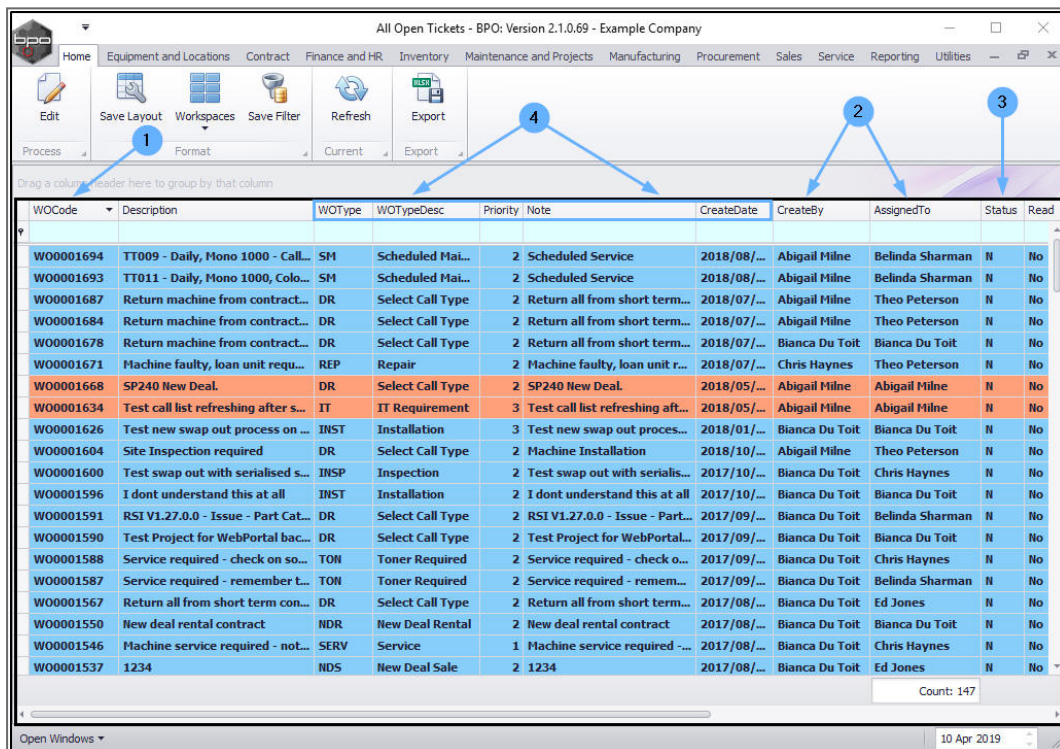
It also gives the user the ability to create ticket assignments to pass the work to the next responsible person, as required.

Ribbon Access: *Service > All Open Tickets*



The ***All Open Tickets*** screen will be displayed.

1. A list of **all** tickets (Work Orders) for **all** users is displayed.
2. You can view tickets (Work Orders) that you have created and assigned to an employee. You can also see any tickets (Work Orders) that other employees have created and assigned.
3. All tickets (Work Orders) are listed, regardless of status.
4. This screen also lists the:
 - the **Work Order Type**
 - the **Work Order Type Description**
 - the work order **Priority** (1 = Most Important, 5 = Least Important)
 - any **Notes** linked to the work order
 - the **Create Date** of each work order



WOCCode	Description	WOType	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read
W00001694	TT009 - Daily, Mono 1000 - Call...	SM	Scheduled Mai...	2	Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N	No
W00001693	TT011 - Daily, Mono 1000, Colo...	SM	Scheduled Mai...	2	Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N	No
W00001687	Return machine from contract...	DR	Select Call Type	2	Return all from short term...	2018/07/...	Abigail Milne	Theo Peterson	N	No
W00001684	Return machine from contract...	DR	Select Call Type	2	Return all from short term...	2018/07/...	Abigail Milne	Theo Peterson	N	No
W00001678	Return machine from contract...	DR	Select Call Type	2	Return all from short term...	2018/07/...	Bianca Du Toit	Bianca Du Toit	N	No
W00001671	Machine faulty, loan unit requ...	REP	Repair	2	Machine faulty, loan unit r...	2018/07/...	Chris Haynes	Theo Peterson	N	No
W00001668	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2018/05/...	Abigail Milne	Abigail Milne	N	No
W00001634	Test call list refreshing after s...	IT	IT Requirement	3	Test call list refreshing aft...	2018/05/...	Abigail Milne	Abigail Milne	N	No
W00001626	Test new swap out process on ...	INST	Installation	3	Test new swap out proces...	2018/01/...	Bianca Du Toit	Bianca Du Toit	N	No
W00001604	Site Inspection required	DR	Select Call Type	2	Machine Installation	2018/10/...	Abigail Milne	Theo Peterson	N	No
W00001600	Test swap out with serialised s...	INSP	Inspection	2	Test swap out with serialis...	2017/10/...	Bianca Du Toit	Chris Haynes	N	No
W00001596	I dont understand this at all	INST	Installation	2	I dont understand this at all	2017/10/...	Bianca Du Toit	Bianca Du Toit	N	No
W00001591	RSI V1.27.0.0 - Issue - Part Cat...	DR	Select Call Type	2	RSI V1.27.0.0 - Issue - Part...	2017/09/...	Bianca Du Toit	Belinda Sharman	N	No
W00001590	Test Project for WebPortal bac...	DR	Select Call Type	2	Test Project for WebPortal...	2017/09/...	Bianca Du Toit	Bianca Du Toit	N	No
W00001588	Service required - check on so...	TON	Toner Required	2	Service required - check o...	2017/09/...	Bianca Du Toit	Chris Haynes	N	No
W00001587	Service required - remember t...	TON	Toner Required	2	Service required - remem...	2017/09/...	Bianca Du Toit	Belinda Sharman	N	No
W00001567	Return all from short term con...	DR	Select Call Type	2	Return all from short term...	2017/08/...	Bianca Du Toit	Ed Jones	N	No
W00001550	New deal rental contract	NDR	New Deal Rental	2	New deal rental contract	2017/08/...	Bianca Du Toit	Bianca Du Toit	N	No
W00001546	Machine service required - not...	SERV	Service	1	Machine service required -...	2017/08/...	Bianca Du Toit	Chris Haynes	N	No
W00001537	1234	NDS	New Deal Sale	2	1234	2017/08/...	Bianca Du Toit	Ed Jones	N	No

- **Read:** This column shows whether the ticket has been read (**Yes**) or not (**No**).

- **Reference:** This column shows whether the ticket is linked to a *Call*, a *Project* or a stand alone *Work Order*
- **Customer Code:** If a ticket is linked to a customer - the customer code will be listed here.
- **Customer Name:** If a ticket is linked to a customer - the customer name will be listed here.
- the number of **Days** that the ticket has been **Unattended**
- the number of **Days** that the ticket has remained **Open**
- the **Elapsed Hours**

All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit | Save Layout | Workspaces | Save Filter | Refresh | Export

Process | Format | Current | Export

Drag a column header here to group by that column

	CreateDate	CreateBy	AssignedTo	Status	Read	Reference	CustomerCode	CustomerName	DaysUnattended	DaysOpen	ElapsedHours
led Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	CN0000582	HOP001	Hope Works	246	246	1 586.50
led Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	CN0000581	HOP001	Hope Works	246	246	1 587.00
all from short term c...	2018/07/24	Abigail Milne	Theo Peterson	N	No	CN0000578	HOP001	Hope Works	260	260	1 675.90
all from short term c...	2018/07/19	Abigail Milne	Theo Peterson	N	No	CN0000575	DER001	Derton Tec...	265	265	1 694.57
all from short term c...	2018/07/19	Bianca Du Toit	Bianca Du Toit	N	No	CN0000569	HOP001	Hope Works	265	265	1 703.77
e faulty, loan unit req...	2018/07/06	Chris Haynes	Theo Peterson	N	No	CN0000567	HOP001	Hope Works	278	278	1 785.07
ew Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	PRJ0000071	TIA001	Titan Group	321	321	0.00
ill list refreshing after ...	2018/05/29	Abigail Milne	Abigail Milne	N	No	CN0000558	HOP001	Hope Works	316	436	2 811.62
ew swap out process o...	2018/01/22	Bianca Du Toit	Bianca Du Toit	N	No	CN0000549	HOP001	Hope Works	443	477	3 073.40
e Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	PRJ0000283	HOP001	Hope Works	163	518	0.00
rap out with serialise...	2017/10/30	Bianca Du Toit	Chris Haynes	N	No	CN0000539	HOP001	Hope Works	527	527	3 384.28
understand this at all	2017/10/25	Bianca Du Toit	Bianca Du Toit	N	No	CN0000532	BEA001	Bearing and...	532	532	0.00
27.0.0 - Issue - Part C...	2017/09/19	Bianca Du Toit	Belinda Sharman	N	No	PRJ0000098	HOP001	Hope Works	568	568	0.00
project for WebPortal b...	2017/09/14	Bianca Du Toit	Bianca Du Toit	N	No	PRJ0000276	GDB0001	Good Books	573	573	0.00
e required - check on ...	2017/09/13	Bianca Du Toit	Chris Haynes	N	No	CN0000533	HOP001	Hope Works	574	574	0.00
e required - remembe...	2017/09/13	Bianca Du Toit	Belinda Sharman	N	No	CN0000533	HOP001	Hope Works	574	574	0.00
all from short term c...	2017/08/14	Bianca Du Toit	Ed Jones	N	No	CN0000522	SAM001	Samanthas ...	604	604	0.00
al rental contract	2017/08/07	Bianca Du Toit	Bianca Du Toit	N	No	CN0000518	HOP001	Hope Works	611	611	0.00
e service required - n...	2017/08/03	Bianca Du Toit	Chris Haynes	N	No	CN0000514	WES001	Westwood ...	615	615	0.00
	2017/08/01	Bianca Du Toit	Ed Jones	N	No	CN0000499	OFF001	Office Suppl...	617	617	0.00

Count: 147

Open Windows | 10 Apr 2019

IMPORTANT NOTES

Ownership

1. **Ownership:** If the user is not the responsible person:
 - i. That user can **take ownership** of the call in **BPO2** by selecting the call in the **Call Listing** screen and clicking on **My Call**.
 - ii. The Call Centre person can **Assign** you to be the responsible person in the **Call Listing** screen.

The My Tickets Screen

2. A User can see only tickets specifically assigned to them or what they have assigned to someone in the **My Tickets** screen.

Unread Tickets

3. **Unread tickets:** these tickets have not been opened for viewing - the text will be in **bold** and the **Read** column will state **No**.

Read Tickets

4. **Read tickets:** As soon as a ticket is opened for viewing – the text will no longer be in bold and the **Read** column will state **Yes**.

All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

	CreateDate	CreateBy	AssignedTo	Status	Read	Reference	CustomerCode	CustomerName	DaysUnattended	DaysOpen	ElapsedHours
led Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	CN0000582	HOP001	Hope Works	246	246	1 586.50
led Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	CN0000581	HOP001	Hope Works	246	246	1 587.00
all from short term c...	2018/07/24	Abigail Milne	Theo Peterson	N	No	CN0000578	HOP001	Hope Works	260	260	1 675.90
all from short term c...	2018/07/19	Abigail Milne	Theo Peterson	N	No	CN0000575	DER001	Derton Tec...	265	265	1 694.57
all from short term c...	2018/07/19	Bianca Du Toit	Bianca Du Toit	N	No	CN0000569	HOP001	Hope Works	265	265	1 703.77
e faulty, loan unit req...	2018/07/06	Chris Haynes	Theo Peterson	N	No	CN0000567	HOP001	Hope Works	278	278	1 785.07
ew Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	PRJ0000071	TIA001	Titan Group	321	321	0.00
il list refreshing after ...	2018/05/29	Abigail Milne	Abigail Milne	N	No	CN0000558	HOP001	Hope Works	316	436	2 811.62
ew swap out process o...	2018/01/22	Bianca Du Toit	Bianca Du Toit	N	No	CN0000549	HOP001	Hope Works	443	477	3 073.40
e Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	PRJ0000283	HOP001	Hope Works	163	518	0.00
ap out with serialise...	2017/10/30	Bianca Du Toit	Chris Haynes	N	No	CN0000539	HOP001	Hope Works	527	527	3 384.28
understand this at all	2017/10/25	Bianca Du Toit	Bianca Du Toit	N	No	CN0000532	BEA001	Bearing and...	532	532	0.00
27.0.0 - Issue - Part C...	2017/09/19	Bianca Du Toit	Belinda Sharman	N	No	PRJ0000098	HOP001	Hope Works	568	568	0.00
object for WebPortal b...	2017/09/14	Bianca Du Toit	Bianca Du Toit	N	No	PRJ0000276	GDB0001	Good Books	573	573	0.00
: required - check on ...	2017/09/13	Bianca Du Toit	Chris Haynes	N	No	CN0000533	HOP001	Hope Works	574	574	0.00
: required - remembe...	2017/09/13	Bianca Du Toit	Belinda Sharman	N	No	CN0000533	HOP001	Hope Works	574	574	0.00
all from short term c...	2017/08/14	Bianca Du Toit	Ed Jones	N	No	CN0000522	SAM001	Samanthas ...	604	604	0.00
al rental contract	2017/08/07	Bianca Du Toit	Bianca Du Toit	N	No	CN0000518	HOP001	Hope Works	611	611	0.00
e service required - n...	2017/08/03	Bianca Du Toit	Chris Haynes	N	No	CN0000514	WES001	Westwood ...	615	615	0.00
	2017/08/01	Bianca Du Toit	Ed Jones	N	No	CN0000499	OFF001	Office Suppl...	617	617	0.00

Count: 147

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TICKET COLOUR

1. **Blue:** The ticket has been assigned to *another* employee.
2. **Red:** The ticket has been assigned to *you* and is for your attention.

All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit | Save Layout | Workspaces | Save Filter | Refresh | Export

Process | Format | Current | Export

Drag a column header here to group by column

	CreateDate	CreateBy	AssignedTo	Status	Read	Reference	CustomerCode	CustomerName	DaysUnattended	DaysOpen	ElapsedHours
Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N	No	CN0000582	HOP001	Hope Works	246	246	1 586.
Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N	No	CN0000581	HOP001	Hope Works	246	246	1 587.
Turn all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N	No	CN0000578	HOP001	Hope Works	260	260	1 675.
Turn all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N	No	CN0000575	DEF001	Derton Tec...	265	265	1 694.
Turn all from short term contr...	2018/07/...	Bianca Du Toit	Bianca Du Toit	N	No	CN0000569	HOP001	Hope Works	265	265	1 703.
Machine faulty, loan unit request...	2018/07/...	Chris Haynes	Theo Peterson	N	No	CN0000567	HOP001	Hope Works	278	278	1 785.
NO New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	PRJ0000071	TIA001	Titan Group	321	321	0.
Call list refreshing after savi...	2018/05/...	Abigail Milne	Abigail Milne	N	No	CN0000558	HOP001	Hope Works	316	436	2 811.
New swap out process on te...	2018/01/...	Bianca Du Toit	Bianca Du Toit	N	No	CN0000549	HOP001	Hope Works	443	477	3 073.
Machine Installation	2018/10/...	Abigail Milne	Theo Peterson	N	No	PRJ0000283	HOP001	Hope Works	163	518	0.
Swap out with serialised sto...	2017/10/...	Bianca Du Toit	Chris Haynes	N	No	CN0000539	HOP001	Hope Works	527	527	3 384.
Don't understand this at all	2017/10/...	Bianca Du Toit	Bianca Du Toit	N	No	CN0000532	BEA001	Bearing and...	532	532	0.
V1.27.0.0 - Issue - Part Cate...	2017/09/...	Bianca Du Toit	Belinda Sharman	N	No	PRJ0000098	HOP001	Hope Works	568	568	0.
Project for WebPortal back ...	2017/09/...	Bianca Du Toit	Bianca Du Toit	N	No	PRJ0000276	GDB0001	Good Books	573	573	0.
Price required - check on som...	2017/09/...	Bianca Du Toit	Chris Haynes	N	No	CN0000533	HOP001	Hope Works	574	574	0.
Price required - remember to ...	2017/09/...	Bianca Du Toit	Belinda Sharman	N	No	CN0000533	HOP001	Hope Works	574	574	0.
Turn all from short term contr...	2017/08/...	Bianca Du Toit	Ed Jones	N	No	CN0000522	SAM001	Samanthas ...	604	604	0.
Deal rental contract	2017/08/...	Bianca Du Toit	Bianca Du Toit	N	No	CN0000518	HOP001	Hope Works	611	611	0.
Machine service required - not s...	2017/08/...	Bianca Du Toit	Chris Haynes	N	No	CN0000514	WES001	Westwood ...	615	615	0.
4	2017/08/...	Bianca Du Toit	Ed Jones	N	No	CN0000499	OFF001	Office Suppl...	617	617	0.

Count: 147

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VIEW A TICKET

Either,

1. Select a ticket.
2. The colour of the ticket will change to **grey**.
3. You can **right click** anywhere on the selected ticket to display a **Process** menu.
4. from this menu, select **Edit** - Edit Ticket.

CO3 BPO All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCCode	Description	WOTType	WOTTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
W00001694	TT009 - Daily, Mono 1000 - Call...	SM	Scheduled Mai...	2	Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N
W00001693	TT011 - Daily, Mono 1000, Colo...	SM	Scheduled Mai...	2	Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N
W00001687	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N
W00001684	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N
W00001678	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Bianca Du Toit	Bianca Du Toit	N
W00001671	Machine faulty, loan unit requ...	REP	Repair	2	Machine faulty, loan unit request...	2018/07/...	Chris Haynes	Theo Peterson	N
W00001668	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N
W00001634	Test call list refreshing after s...	IT	IT Requirement	3	Test call list refreshing after savi...	2018/05/...	Abigail Milne	Abigail Milne	N
W00001626	Test new swap out process on ...	INST	Installation	2	Test new swap out process on te...	2018/01/...	Bianca Du Toit	Bianca Du Toit	N
W00001604	Site Inspection required	DR	Select Call Type	2	Machine Installation	2018/10/...	Abigail Milne	Theo Peterson	N
W00001600	Test swap out with serialised s...	INSP	Inspection	2	Test swap out with serialised sto...	2017/10/...	Bianca Du Toit	Chris Haynes	N
W00001596	I dont understand this at all	INST	Installation	2	I dont understand this at all	2017/10/...	Bianca Du Toit	Bianca Du Toit	N
W00001591	RSI V1.27.0.0 - Issue - Part Cat...	DR	Select Call Type	2	RSI V1.27.0.0 - Issue - Part Cate...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
W00001590	Test Project for WebPortal bac...	DR	Select Call Type	2	Test Project for WebPortal back ...	2017/09/...	Bianca Du Toit	Bianca Du Toit	N
W00001588	Service required - check on so...	TON		2	Service required - check on som...	2017/09/...	Bianca Du Toit	Chris Haynes	N
W00001587	Service required - remember t...	TON		2	Service required - remember to ...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
W00001567	Return all from short term con...	DR		2	Return all from short term contr...	2017/08/...	Bianca Du Toit	Ed Jones	N
W00001550	New deal rental contract	NDR		2	New deal rental contract	2017/08/...	Bianca Du Toit	Bianca Du Toit	N
W00001546	Machine service required - not...	SERV		1	Machine service required - not s...	2017/08/...	Bianca Du Toit	Chris Haynes	N
W00001537	1234	NDS		2	1234	2017/08/...	Bianca Du Toit	Ed Jones	N

Count: 147

Open Windows 10 Apr 2019

Or,

- Select the ticket.
- Click on **Edit**.

Or,

- **Double click** on the selected ticket.
 - In this image, **DWO0000239** has been selected.

All Open Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCCode	Description	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
DWO0000151	ndrm	New Deal Rental	2	ndrm	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000150	ndrsa	New Deal Rental	2	ndrsa	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000149	ndrmg	New Deal Rental	2	ndrmg	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000140	nds	New Deal Sale	2	nds	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000204	nds	New Deal Sale	2	nds	2017/10/24	Judith Mudzengi	Belinda Sharmane	N
DWO0000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	N
DWO0000240	TT013 - Weekly Colour 1000 - Call...	Scheduled Maintenance	2	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	N
DWO0000241	TT021 - Yearly Mono 1000 - Call p...	Scheduled Maintenance	2	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	N
DWO0000261	Work Management - Call test 2	Repair	3	Work Manageme...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000260	Work Management - Testing1	Service	3	Work Manageme...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000255	Loan Unit - Part Requests	Repair	3	Loan Unit - Part ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000064	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/07/12	Judith Mudzengi	Judith Mudzengi	C
DWO0000064	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	test 2	2018/10/08	Judith Mudzengi	Judith Mudzengi	C
DWO0000315	test 1	New Deal Sale	2	test 1	2018/11/19	Judith Mudzengi	Judith Mudzengi	C
DWO0000315	test 1	New Deal Sale	2	test 1	2018/11/19	Judith Mudzengi	Belinda Sharmane	N

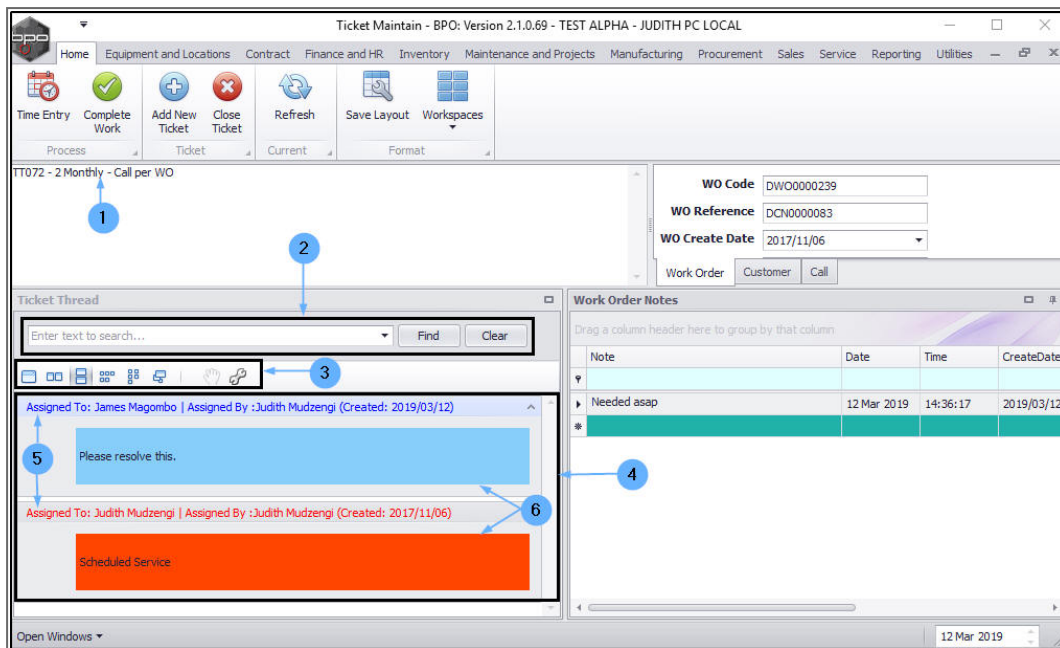
Count: 40

Open Windows 12 Mar 2019

THE TICKET MAINTAIN SCREEN

The Ticket Maintain Screen will open.

- Work Order Description:** This is the work order description.
- Search field:** To search for any ticket in the ticket thread; type in the text and click on **Find**. To clear the search; click on **Clear**.
- Customization bar:** You can customize the look of the ticket thread to your liking by clicking on any of the **icons**. If you **hover** any icon, the icon description will pop up.
- Ticket Thread:** This is where all tickets linked to the selected work order are displayed.
 - Note:** The tickets are in inverse chronological order. The recently created ticket will always be on top of the list.
- Assignment:** You can see the assignor, assignee and the date the ticket was created.
- Comments:** These are the tickets (comments) related to the work order.

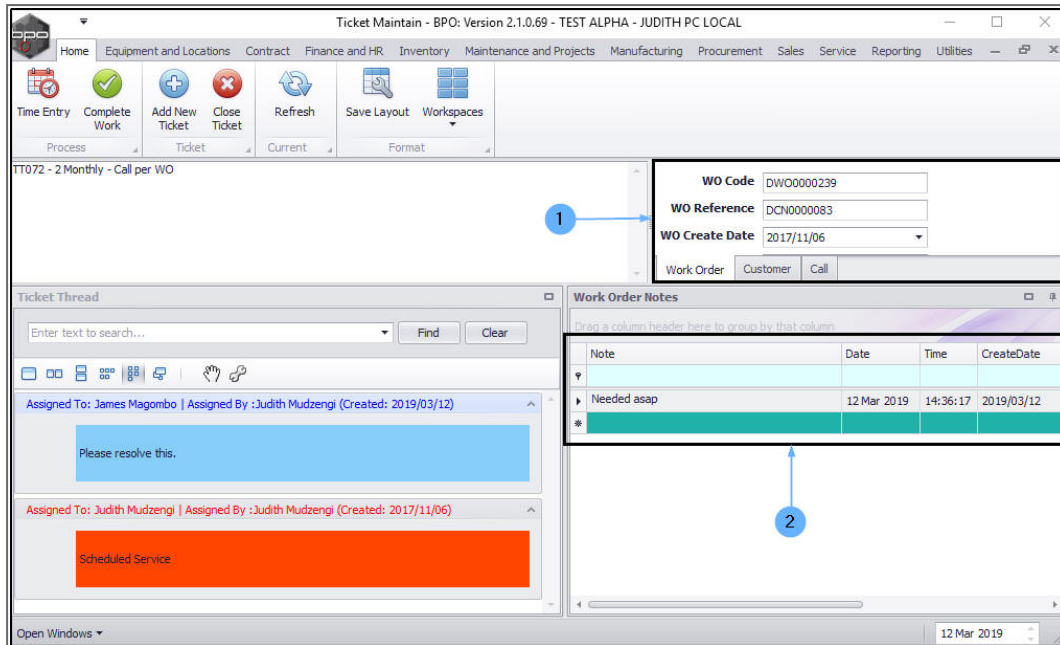


1. TICKET MAINTAIN SCREEN TABS

- **Work Order:** Click on this tab to view the work order details.
- **Customer:** Click on this tab to view the customer details. All fields are populated if the work order is linked to a customer.
- **Call / Project:** Click on this tab to view the call/project details. All fields are populated if the work order is linked to a call / project.

2. WORK ORDER NOTES

- In this frame, you can view the linked work order notes and the date and time that they were created.



ASSIGN A TICKET

In the *All Open Tickets* screen;

1. Select the ticket you wish to assign to **another** employee.
 - In this image, **DWO0000264** was selected.
2. You will note that the current **Status** of the ticket is **N** - New.
3. Click on **Edit**

All Open Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCCode	Description	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
DWO0000089	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/07/12	Judith Mudzengi	Judith Mudzengi	C
DWO0000089	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	Look at this ticke...	2019/03/12	Judith Mudzengi	Judith Mudzengi	N
DWO0000138	ndr1	New Deal Rental	2	ndr1	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	C
DWO0000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	2	Please resolve th...	2019/03/12	Judith Mudzengi	James Magombo	N
DWO0000257	Parial Issue	Select Call Type	2	Parial Issue	2017/11/23	Judith Mudzengi	Belinda Sharmane	N
DWO0000264	Project Work Order - Pretoria	Select Call Type	2	Project Work Ord...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000233	Project Invoices	Select Call Type	2	Project Invoices ...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DWO0000254	new deal project rental	New Deal Rental	2	new deal project re...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000242	TT033 - Daily Colour 1000 - Gener...	Scheduled Maintenance	2	TT033 - Daily Col...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000265	TT033 - Daily Colour 1000 - Gener...	Select Call Type	2	TT033 - Daily Col...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DWO0000232	Project - Quotes ...	Select Call Type	2	Project - Quotes ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000266	Project Assignment Test 1	Select Call Type	2	Project Assignment ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000273	Auto Apply Task Configuration to ...	Select Call Type	2	Auto Apply Task ...	2018/01/16	Judith Mudzengi	James Magombo	N
DWO0000267	Project Assignment Test 3	Select Call Type	2	Project Test Test 3	2017/11/29	Judith Mudzengi	Judith Mudzengi	C
DWO0000267	Project Assignment Test 3	Select Call Type	2	test 3	2018/10/08	Judith Mudzengi	James Magombo	N

Count: 41

Open Windows 13 Mar 2019

The **Ticket Maintain** screen will be displayed.

- Click on **Add New Ticket**.

Ticket Maintain - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Time Entry Complete Work Add New Ticket Close Ticket Refresh Save Layout Workspaces

Process Ticket Current Format

Project Work Order - Pretoria

WO Code: DWO0000264
 WO Reference: PRJ0000033
 WO Create Date: 2017/11/29
 WO Priority: 2
 WO Type: DR

Work Order Customer Project

Ticket Thread

Enter text to search... Find Clear

Assigned To: Judith Mudzengi | Assigned By: Judith Mudzengi (Created: 2017/11/29)

Project Work Order - Pretoria

Work Order Notes

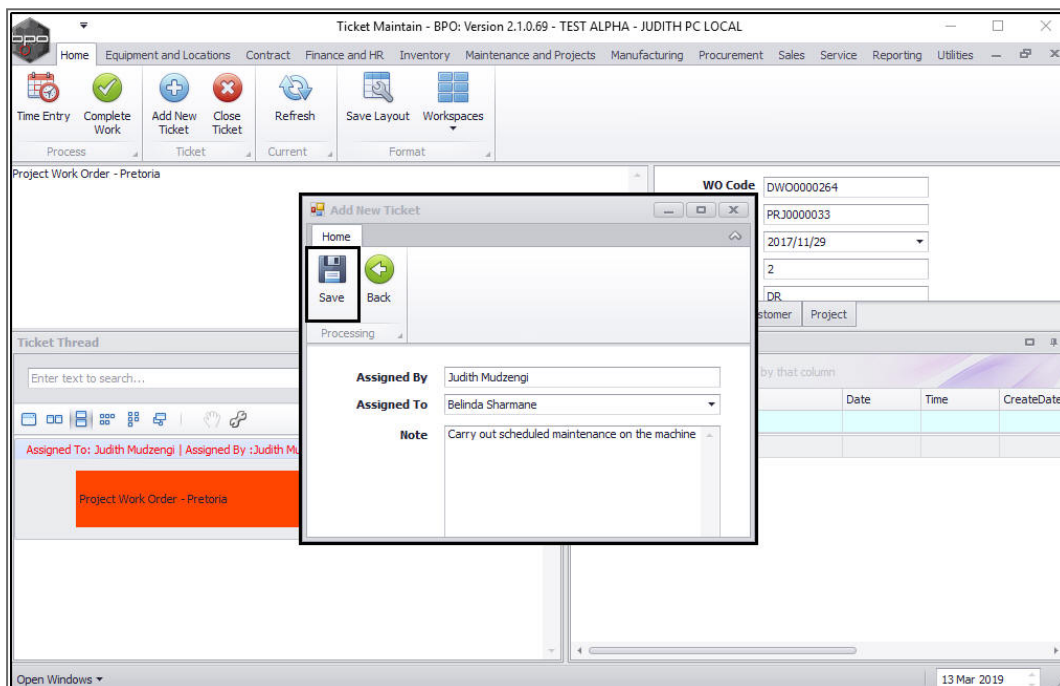
Drag a column header here to group by that column

Note	Date	Time	CreateDate

Open Windows 13 Mar 2019

The **Add New Ticket** screen will pop up.

- **Assigned by:** This will auto-populated with the name of the user currently logged onto the system.
- **Assigned To:** Click on the drop-down arrow and select the employee that you wish to assign the ticket to.
- **Note:** Type in the notes or instructions that you wish to relay to the person that you are assigning the ticket to.
- Click on **Save**.



The **Add New Ticket** screen and **Ticket Maintain** screen will close.

1. You will return to the **All Open Tickets** screen.
2. The selected ticket's status will change to **C** - closed.
3. A **new ticket** will be displayed assigned to the **new employee** and set to status **N** - New.

1 → All Open Tickets BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCCode	Description	WOTypeDesc	Note	CreateDate	CreateBy	AssignedTo	Status
DWO0000089	TT002 - Weekly - Call per WO	Scheduled Maintenance	Look at this ticket later	2019/03/12	Judith Mudzengi	Judith Mudzengi	N
DWO0000138	ndr1	New Deal Rental	ndr1	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	C
DWO0000239	TT072 - 2 Monthly - Call per ...	Scheduled Maintenance	Please resolve this.	2019/03/12	Judith Mudzengi	James Magombo	N
DWO0000257	Parial Issue	Select Call Type	Parial Issue	2017/11/23	Judith Mudzengi	Belinda Sharmane	N
DWO0000233	Project Invoices	Select Call Type	Project Invoices	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DWO0000254	new deal project rental	New Deal Rental	new deal project rental	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000242	TT033 - Daily Colour 1000 - G...	Scheduled Maintenance	TT033 - Daily Colour 1000 - Gener...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000265	TT033 - Daily Colour 1000 - G...	Select Call Type	TT033 - Daily Colour 1000 - Gener...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DWO0000232	Project - Quotes	Select Call Type	Project - Quotes	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000266	Project Assignment Test 1	Select Call Type	Project Assignment Test 1	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000273	Auto Apply Task Confiuration to ...	Select Call Type	Auto Apply Task Confiuration to ...	2018/01/16	Judith Mudzengi	James Magombo	N
DWO0000267	Project Assignment Test 3	Select Call Type	Project Test Test 3	2017/11/29	Judith Mudzengi	Judith Mudzengi	C
DWO0000267	Project Assignment Test 3	Select Call Type	test 3	2018/10/08	Judith Mudzengi	James Magombo	N
DWO0000264	Project Work Order - Pretoria	Select Call Type	Project Work Order - Pretoria	2017/11/29	Judith Mudzengi	Judith Mudzengi	C
DWO0000264	Project Work Order - Pretoria	Select Call Type	Carry out scheduled maintenance...	2019/03/13	Judith Mudzengi	Belinda Sharmane	N

Count: 42

Open Windows 13 Mar 2019

2 →

3 →

ADD WORK ORDER NOTES

- Select the ticket that you wish to add work order notes to.
 - In this image, **DWO0000232** was selected.
- Click on **Edit**.

All Open Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

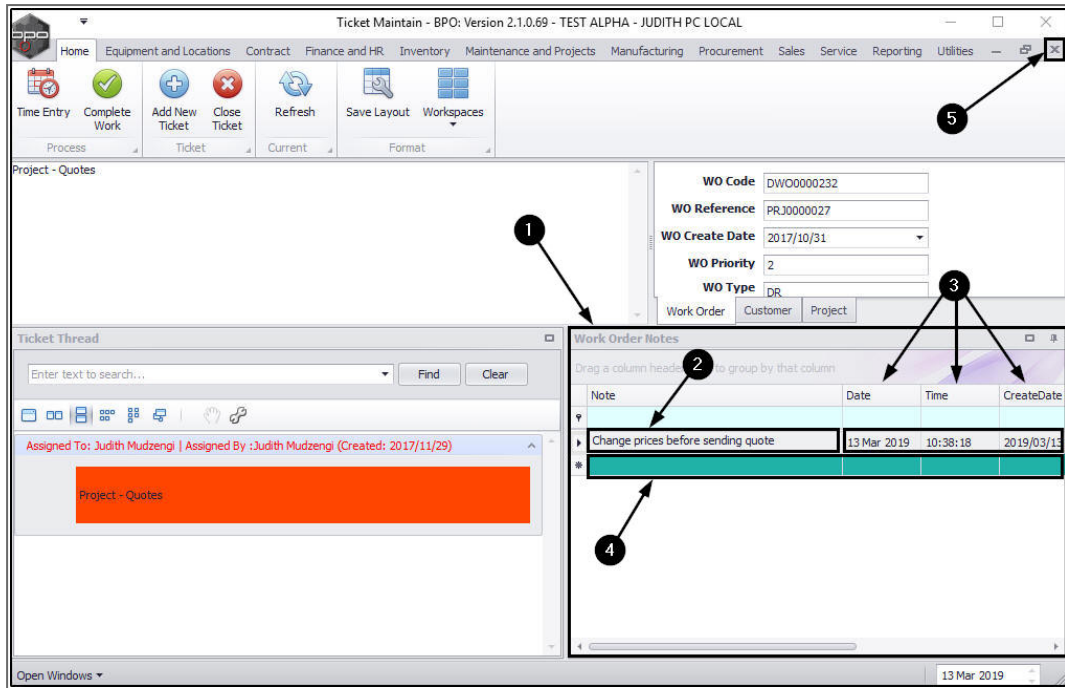
WOCCode	Description	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
DWO0000089	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	Look at this ticke...	2019/03/12	Judith Mudzengi	Judith Mudzengi	N
DWO0000138	ndr1	New Deal Rental	2	ndr1	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	C
DWO0000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	2	Please resolve th...	2019/03/12	Judith Mudzengi	James Magombo	N
DWO0000257	Parial Issue	Select Call Type	2	Parial Issue	2017/11/23	Judith Mudzengi	Belinda Sharmane	N
DWO0000233	Project Invoices	Select Call Type	2	Project Invoices ...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DWO0000254	new deal project rental	New Deal Rental	2	new deal project re...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000242	TT033 - Daily Colour 1000 - Gener...	Scheduled Maintenance	2	TT033 - Daily Col...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000265	TT033 - Daily Colour 1000 - Gener...	Select Call Type	2	TT033 - Daily Col...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DWO0000232	Project - Quotes	Select Call Type	2	Project - Quotes ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000266	Project Assignment Test 1	Select Call Type	2	Project Assignment ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DWO0000273	Auto Apply Task Confiuration to ...	Select Call Type	2	Auto Apply Task ...	2018/01/16	Judith Mudzengi	James Magombo	N
DWO0000267	Project Assignment Test 3	Select Call Type	2	Project Test Test 3	2017/11/29	Judith Mudzengi	Judith Mudzengi	C
DWO0000267	Project Assignment Test 3	Select Call Type	2	test 3	2018/10/08	Judith Mudzengi	James Magombo	N
DWO0000264	Project Work Order - Pretoria	Select Call Type	2	Project Work Order ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	C
DWO0000264	Project Work Order - Pretoria	Select Call Type	2	Carry out schedul...	2019/03/13	Judith Mudzengi	Belinda Sharmane	N

Count: 42

Open Windows 13 Mar 2019

The **Ticket Maintain** screen will be displayed.

1. In the **Work Order Notes** frame,
2. Type in the **Note** column in the **first row** of the data grid (not the filter row).
3. The **Date**, **Time** and **Create Date** will auto populate with the current date and time.
4. If you wish to create another note, press **Enter** on your keyboard and a new row will be created. Type the next note in this new row. You can add multiple notes.
5. **Close** the screen when you are done.



TIME BOOKING

The system will log your time as you work based on you **Starting** and **Ending** work.

- In the **All Open Tickets** screen, select the ticket that you wish to book time for.
 - In this image, **WO0001748** is selected.
- Click on **Edit**

CO3 BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

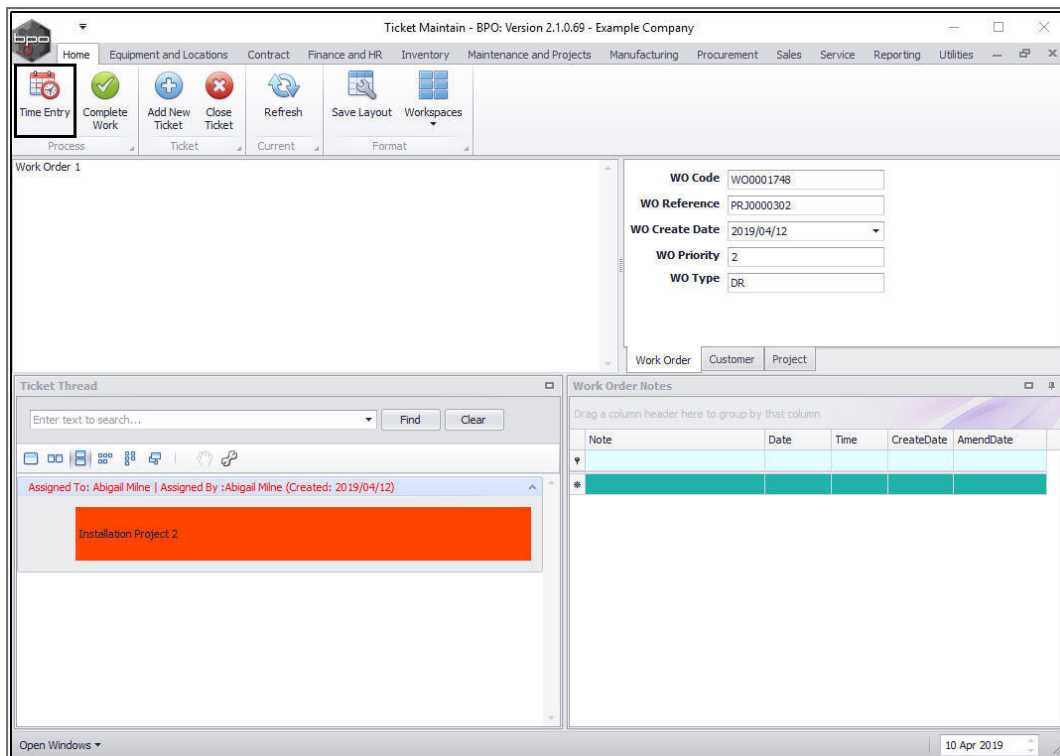
WOCCode	Description	WOType	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read
WO0001202	Unresolved client, completed and r...	DR	Select Call Type	2	Unresolved client, completed and rea...	2017/03/30	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001202	Unresolved client, completed and r...	DR	Select Call Type	2	Unresolved	2017/03/30	Judith Mudzengi	Judith Mudzengi	N	Yes
WO0001207	Location - Unresolved client, compl...	DR	Select Call Type	2	Location - Unresolved client, complete...	2017/03/30	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001207	Location - Unresolved client, c...	DR	Select Call Type	2	Unresolved client	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001198	Resolved and reassigned	DR	Select Call Type	2	Resolved and reassigned	2017/03/30	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001198	Resolved and reassigned	DR	Select Call Type	2	Resolved and reassigned	2017/03/...	Judith Mudze...	Bianca Du Toit	N	No
WO0001213	work order linked to asset unresolv...	DR	Select Call Type	2	work order linked to asset unresolv...	2017/03/31	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001213	work order linked to asset un...	DR	Select Call Type	2	Unresolved and reassigned	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001217	work order linked to location - resol...	DR	Select Call Type	2	work order linked to location - resolve...	2017/03/31	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001217	work order linked to location - ...	DR	Select Call Type	2	Location - resolved and reassign...	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001219	work order linked to location	DR	Select Call Type	2	work order linked to location	2017/03/31	Judith Mudzengi	Judith Mudzengi	N	Yes
WO0001226	Test ticketing time.	DR	Select Call Type	2	Test ticketing time.	2017/04/...	Bianca Du Toit	Bianca Du Toit	N	No
WO0001227	Test ticketing multiple time logs	DR	Select Call Type	2	Test ticketing multiple time logs	2017/04/03	Bianca Du Toit	Bianca Du Toit	N	Yes
WO0001311	A new assignment that needs to be...	DR	Select Call Type	2	A new assignment that needs to be f...	2017/04/20	Bianca Du Toit	Bianca Du Toit	N	Yes
WO0001395	Swap out WO from project	DR	Select Call Type	2	Swap Outs p rojects v2.1.0.5	2017/06/...	Judith Mudze...	Judith Mudzengi	N	No
WO0001212	work order linked to asset - re...	DR	Select Call Type	2	Resolved and reassigned	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001212	work order linked to asset - resolve...	DR	Select Call Type	2	work order linked to asset - resolved ...	2017/03/31	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001746	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2019/04/...	Abigail Milne	Belinda Sharman	N	No
WO0001748	Work Order 1	DR	Select Call Type	2	Installation Project 2	2019/04/12	Abigail Milne	Abigail Milne	N	Yes
WO0001751	Installation Project 1	DR	Select Call Type	2	Installation Project 1	2019/04/...	Abigail Milne	Belinda Sharman	N	No
WO0001754	Installation Project 4	DR	Select Call Type	2	Installation Project 4	2019/04/...	Abigail Milne	Belinda Sharman	N	No

Count: 147

Open Windows 10 Apr 2019

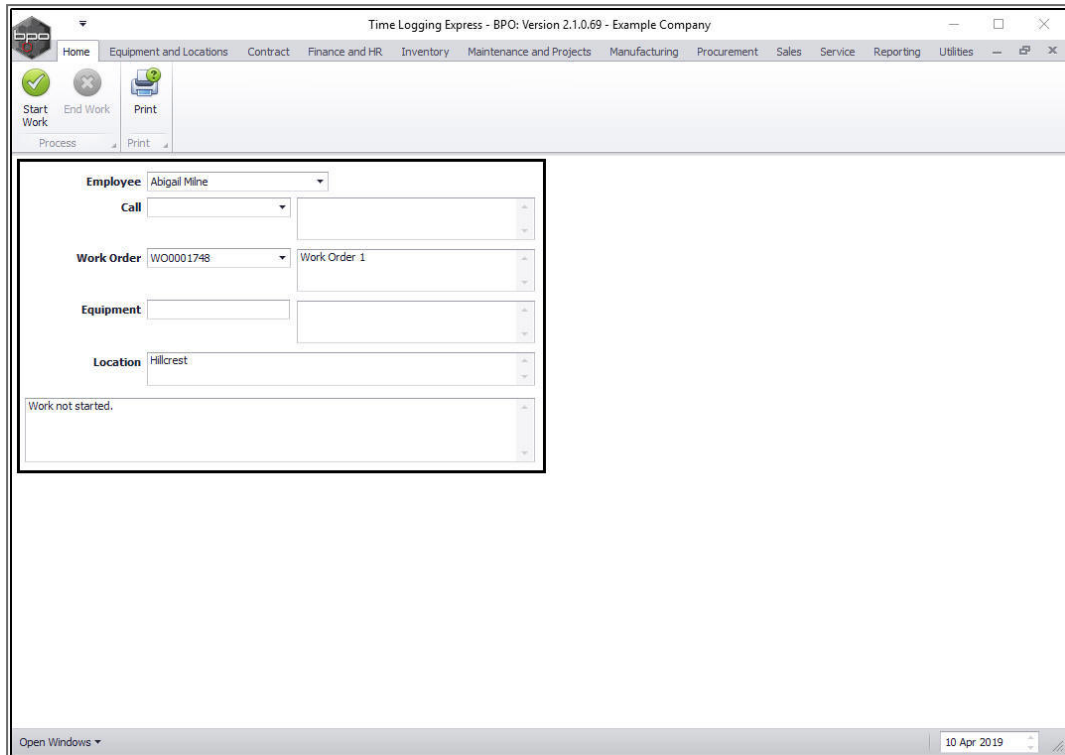
The **Ticket Maintain** screen will be displayed.

- Click on **Time Entry**.



The Time Logging Express screen will be displayed.

- **Employee:** This will auto populated with the person currently logged on to the system.
- **Call:** This will auto populate with the call number and description if the work order is linked to a call.
- **Work Order:** This will auto populate with the work order number and description.
- **Equipment:** This will auto populate with the serial number and description if a machine is linked to the work order.
- **Location:** This will auto populate with the location if a functional location is linked to the work order.
- **Status:** The final unlabelled text box will contain a description of the current status of the work e.g. ***"Work not started"***.



Time Logging Express - BPO: Version 2.1.0.69 - Example Company

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

Start Work End Work Print Process Print

Employee: Abigail Milne

Call: [dropdown]

Work Order: WO0001748 Work Order: 1

Equipment: [dropdown]

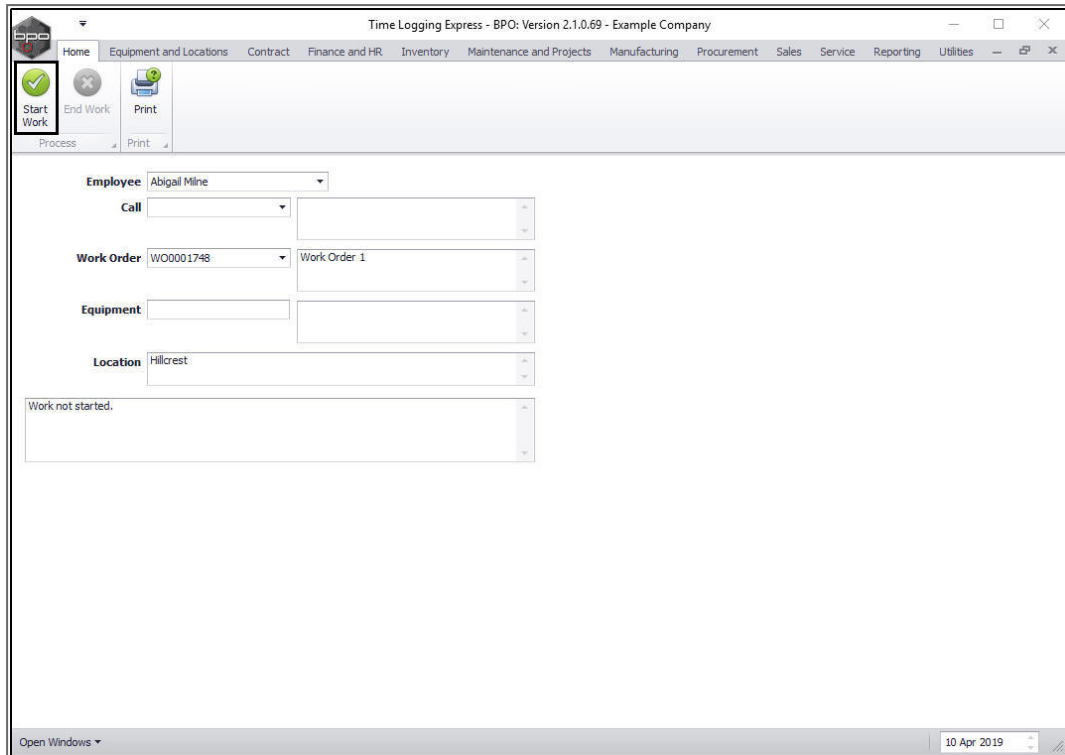
Location: Hillcrest

Work not started.

Open Windows 10 Apr 2019

Start Work

- Click on **Start Work**.



The **Time Logging Express** screen will close and you will return to the **Ticket Maintain** screen.

- A **Call Processing** message box will pop up informing you that;
 - **Call No: [] has been released.**
- Click on **Ok**.

Ticket Maintain - BPO: Version 2.1.0.69 - Example Company

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

Time Entry | Complete Work | Add New Ticket | Close Ticket | Refresh | Save Layout | Workspaces

Process | Ticket | Current | Format

Work Order 1

Call Processing

Call No : has been released.

OK

WO Code: WO0001748
 WO Reference: PRJ0000302
 WO Create Date: 2019/04/12
 WO Priority: 2
 WO Type: DR

Work Order | Customer | Project

Ticket Thread

Enter text to search... Find Clear

Assigned To: Abigail Mline | Assigned By :Abigail Mline (Created: 2019/04/12)

Installation Project 2

Work Order Notes

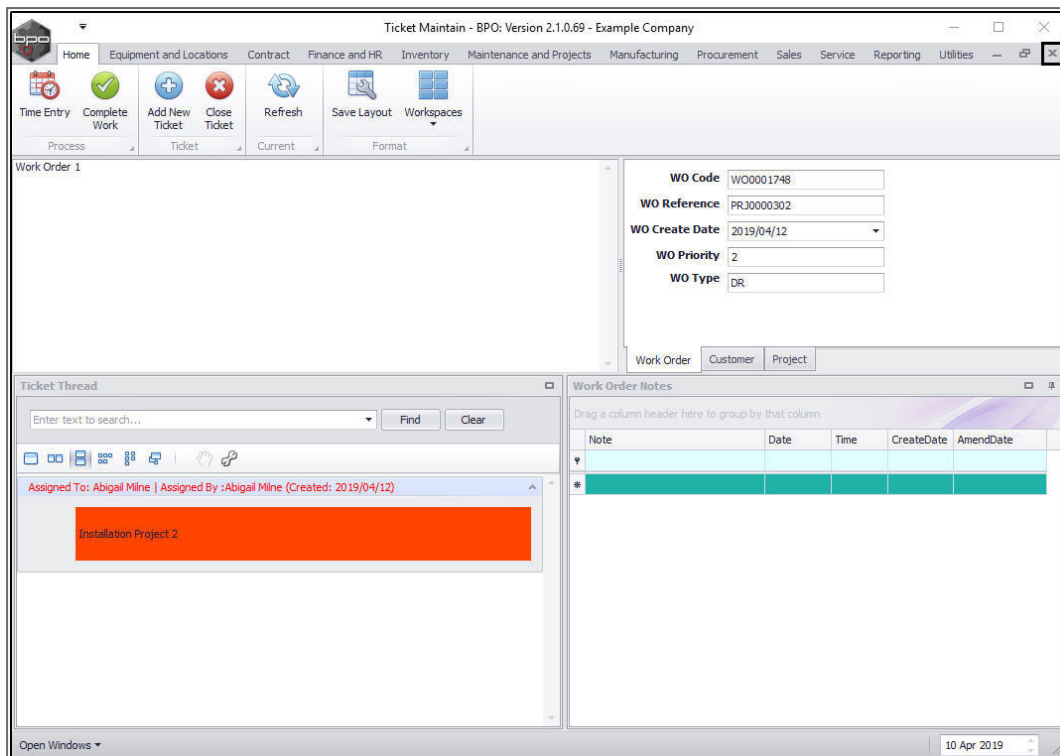
Drag a column header here to group by that column

Note	Date	Time	CreateDate	AmendDate

Open Windows

10 Apr 2019

- The message box will close.
- To exit the screen, click on **Close**.

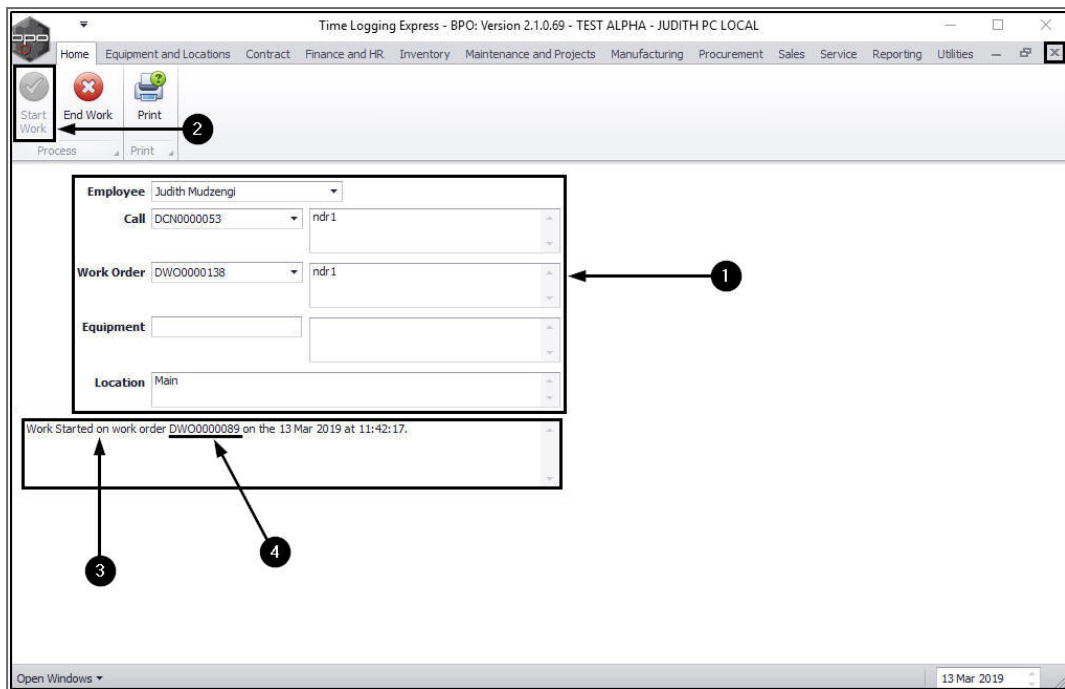


Important Note:

You cannot **start work** on a new ticket before **ending work** on the previous ticket.

1. Although details of the current ticket will be displayed in the **Time Logging Express** screen,
2. the **Start Work** button will be **greyed out**
3. and the work status of the **previous** ticket will be displayed in the **Work Status** text box.
4. If this is the case - take note of the work order number at the bottom of the screen, close this screen and go and **end work** on the previous ticket.

Note : You can **Print the Work Order Report** from this screen.



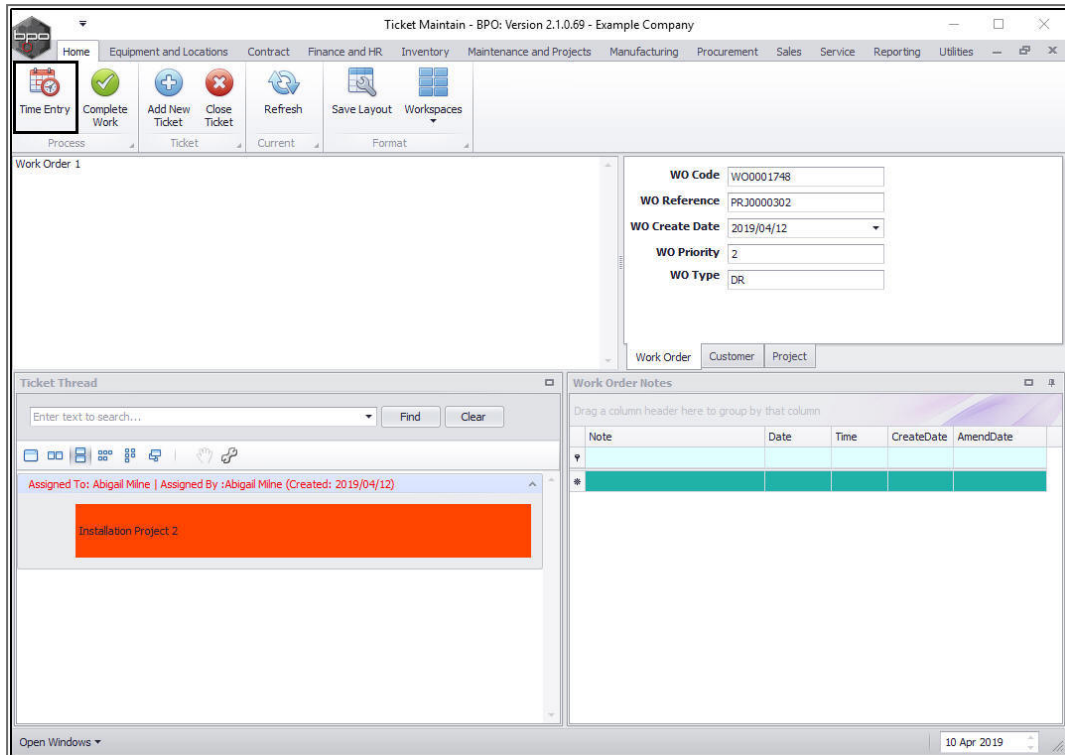
End Work or Complete Work

If you need to **stop** the current work, use the **End Work** process. This will book your time for the current work. Remember to type in a **note** regarding what work was done during this time.

If the work is done, then use the **Complete Work** process.

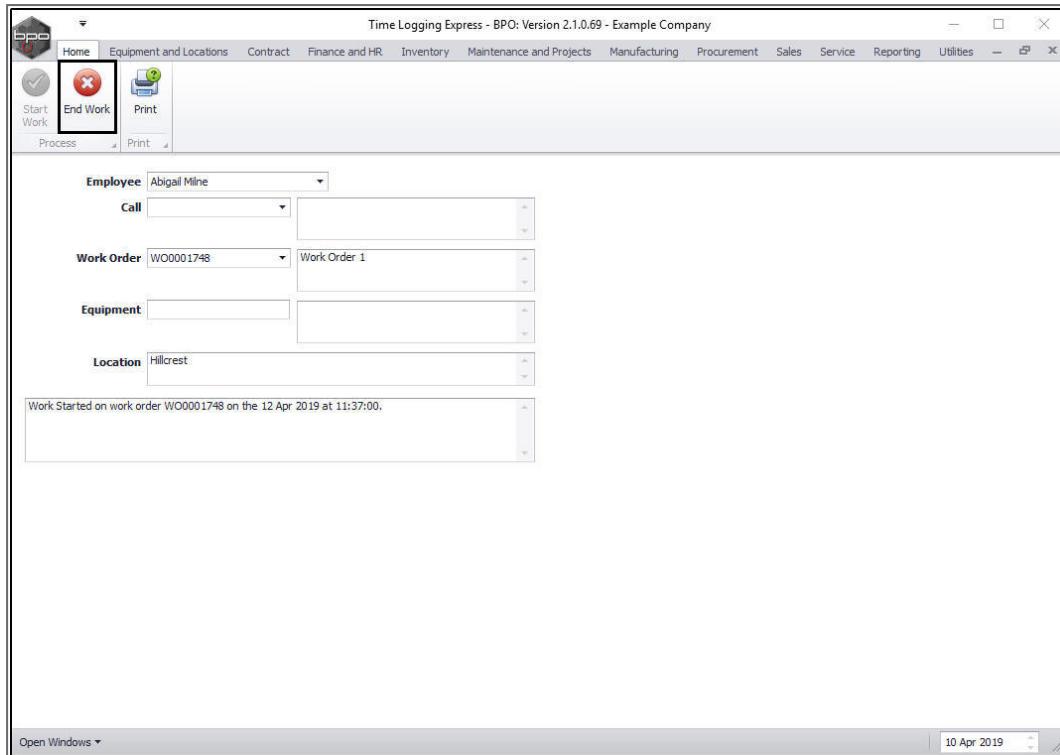
End Work

- In the **Ticket Maintain** screen, click on **Time Entry**.



The ***Time Logging Express*** screen will be displayed.

- Click on ***End Work***.



The **Close Open Work** screen will be displayed.

Ticket Details:

- **Employee** : This will auto populated with the person currently logged on to the system.
- **Call** : This will auto populate with the call number and description if the work order is linked to a **call**.
- **Work Order** : This will auto populate with the work order number and description.
- **Equipment** : This will auto populate with the serial number and description of the equipment item if such an item is linked to the work order.
- **Location** : This will auto populate with the location if a functional location is linked to the work order.

Close Open Work - BPO: Version 2.1.0.69 - Example Company

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

End Work Save Layout

Process Format

Employee: Abigail Milne

Project: PRJ0000302 Installation Project 2

Work Order: WO0001748 Work Order 1

Equipment:

Location: Hillcrest

Work State: ☐ Unresolved Client ☐ Unresolved ☐ Resolved

Rectification Code:

Comments:

Work Started on work order WO0001748 on the 12 Apr 2019 at 11:37:00.

Prior Work:

Drag a column header here to group by that column

ParentRef	WOCODE	Description	Status	StatusDesc	Rectificatio...	WorkDate
PRJ0000302	WO0001748	Work Orde...	O	Open		1900/01/01

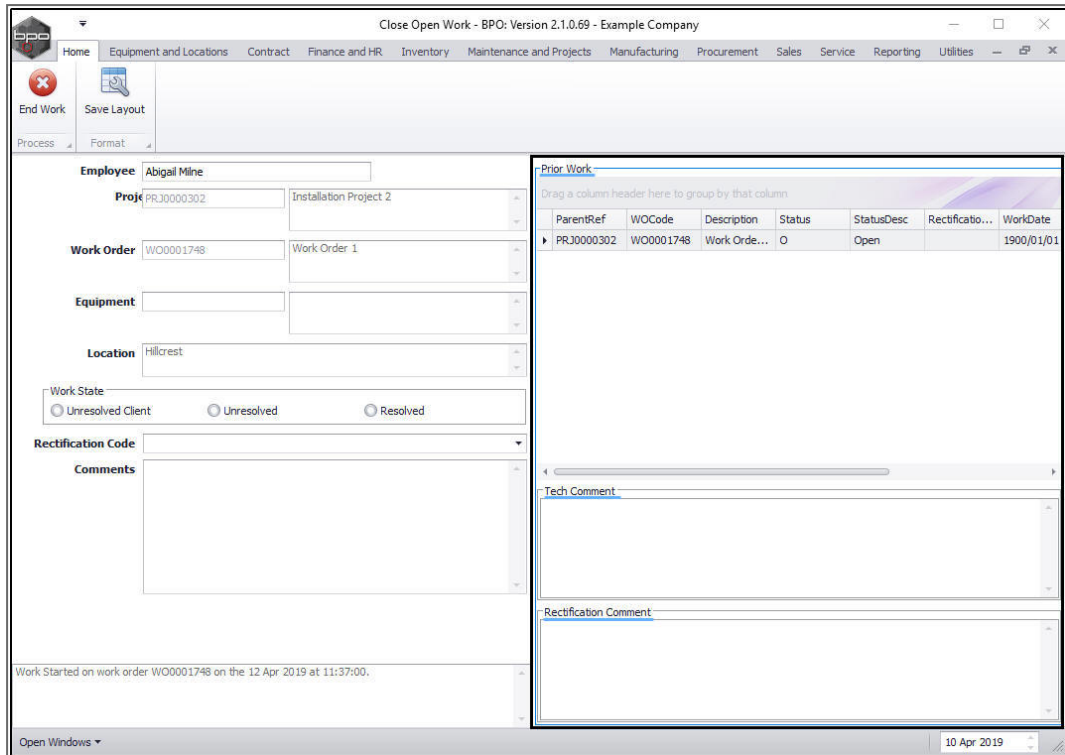
Tech Comment:

Rectification Comment:

Open Windows 10 Apr 2019

Prior Work, Tech Comments and Rectification Comments

- In this frame you can view prior work done and any Technician or Rectification comments logged.



Close Open Work - BPO: Version 2.1.0.69 - Example Company

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

End Work Save Layout

Process Format

Employee: Abigail Milne

Project: PRJ0000302 Installation Project 2

Work Order: WO0001748 Work Order 1

Equipment:

Location: Hillcrest

Work State: ☐ Unresolved Client ☐ Unresolved ☐ Resolved

Rectification Code:

Comments:

Prior Work

Drag a column header here to group by that column

ParentRef	WOCode	Description	Status	StatusDesc	Rectification...	WorkDate
PRJ0000302	WO0001748	Work Orde...	O	Open		1900/01/01

Tech Comment:

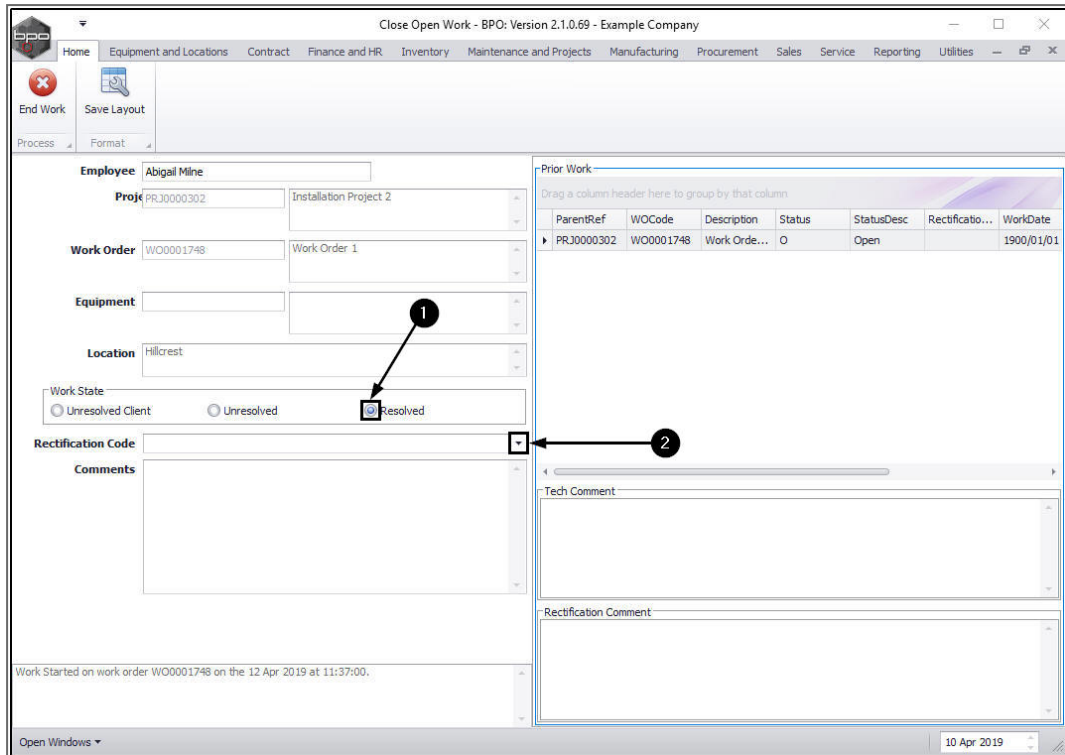
Rectification Comment:

Work Started on work order WO0001748 on the 12 Apr 2019 at 11:37:00.

Open Windows 10 Apr 2019

Work State and Resolution Actions

- In the Work State frame, select one of the 3 listed **Work States**:
 - Unresolved (Client)** - once processed, this call will move to **On Hold**.
 - Unresolved** - once processed, this call will move to **Pending**.
 - Resolved** - once processed, this call will move to **Complete**.
- Click on the **drop-down arrow** in the **Rectification Code** field.



Close Open Work - BPO: Version 2.1.0.69 - Example Company

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

End Work Save Layout

Process Format

Employee: Abigail Milne

Project: PRJ0000302 Installation Project 2

Work Order: WO0001748 Work Order 1

Equipment: [Empty]

Location: Hillcrest

Work State: ☐ Unresolved Client ☐ Unresolved ☒ Resolved

Rectification Code: [Empty]

Comments: [Empty]

Work Started on work order WO0001748 on the 12 Apr 2019 at 11:37:00.

Prior Work:

Drag a column header here to group by that column

ParentRef	WOCCode	Description	Status	StatusDesc	Rectificatio...	WorkDate
PRJ0000302	WO0001748	Work Orde...	O	Open		1900/01/01

Tech Comment: [Empty]

Rectification Comment: [Empty]

Open Windows 10 Apr 2019

- Select from the **Rectification Code** drop-down menu, a **Reason Code**.
- In this example, **Fixed**- Fixed machine has been selected.

Close Open Work - BPO: Version 2.1.0.69 - Example Company

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

End Work Save Layout

Process Format

Employee: Abigail Milne

Project: PRJ0000302 Installation Project 2

Work Order: WO0001748 Work Order 1

Equipment:

Location: Hillcrest

Work State: ☐ Unresolved Client ☐ Unresolved ☒ Resolved

Rectification Code:

ReasonCode	Description
FIXED	Fixed machine
PDI	Parts Delivered and Installed
RC	Replaced components
RM	Replaced Machine
SM	Serviced Machine
IR	IT Related
RP	Replaced Parts

Comments:

Work Started on work order WO0001748 on the 12 Apr 2019 at 11:37:00.

Prior Work:

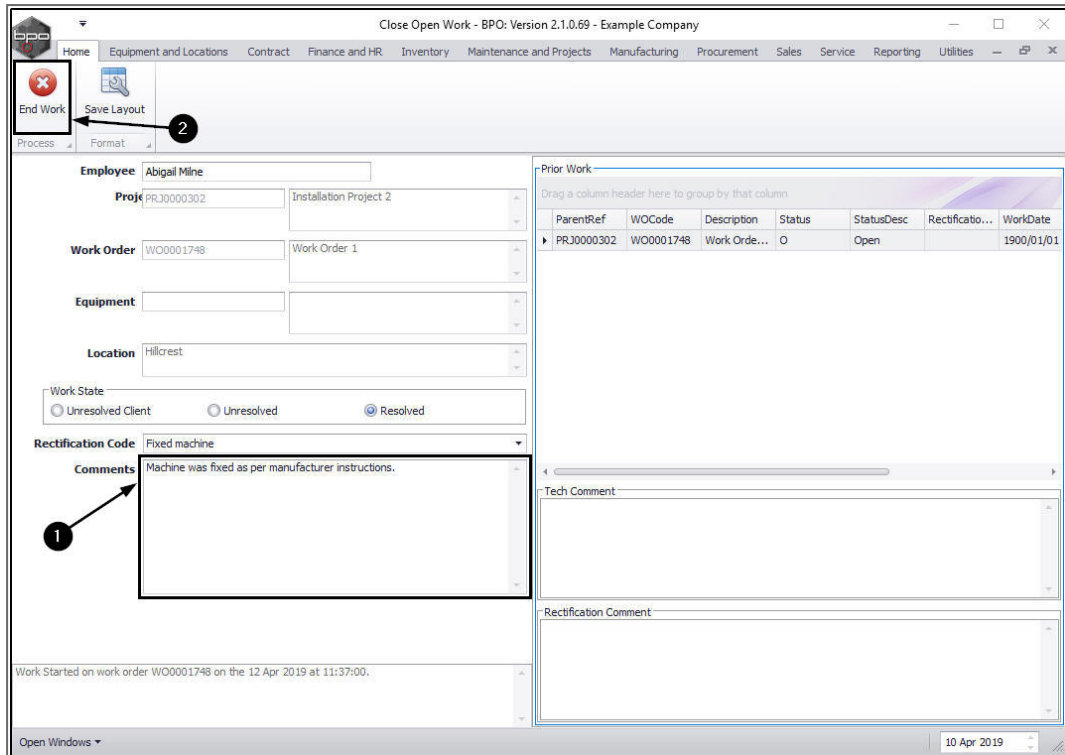
ParentRef	WOCODE	Description	Status	StatusDesc	Rectificatio...	WorkDate
PRJ0000302	WO0001748	Work Orde...	O	Open		1900/01/01

Tech Comment:

Rectification Comment:

Open Windows 10 Apr 2019

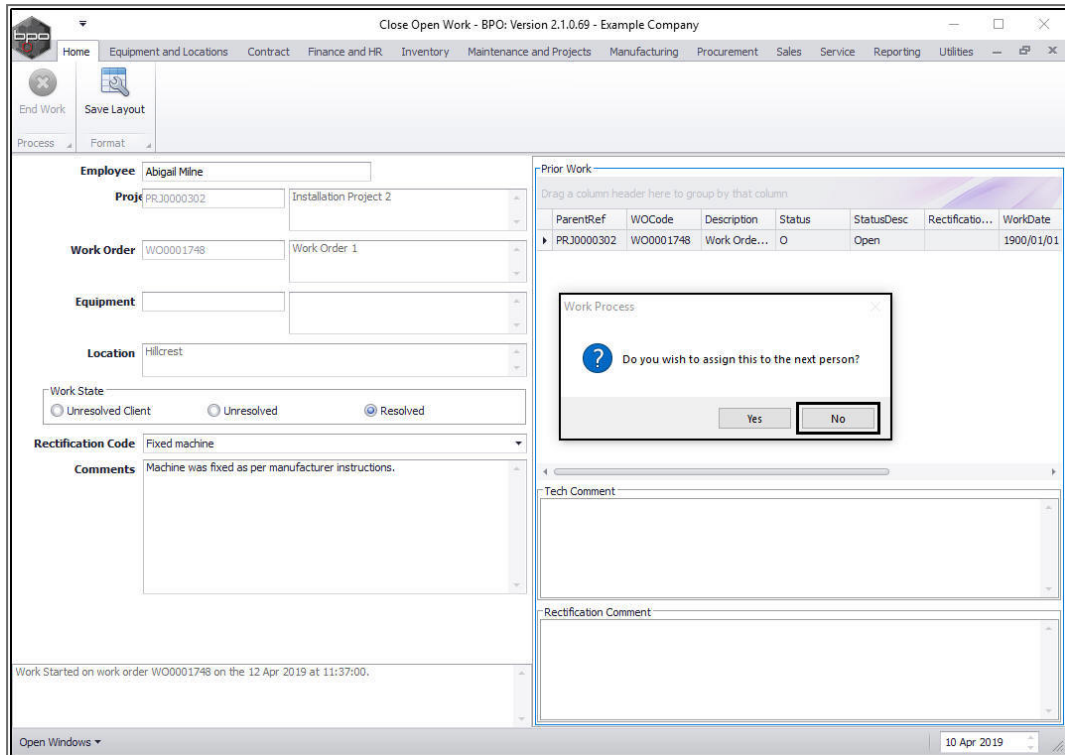
1. Type in any relevant information in the **Comments** text box - this is mandatory.
2. Click on **End Work**.



You now need to decide whether to **end the work without assigning any work to the next person** or whether to **end the work and assign it to the next person**.

End Work Without Assigning to the Next Person

- A **Work Process** message will pop up asking;
 - ***Do you wish to assign this to the next person?***
- Click on **No**.

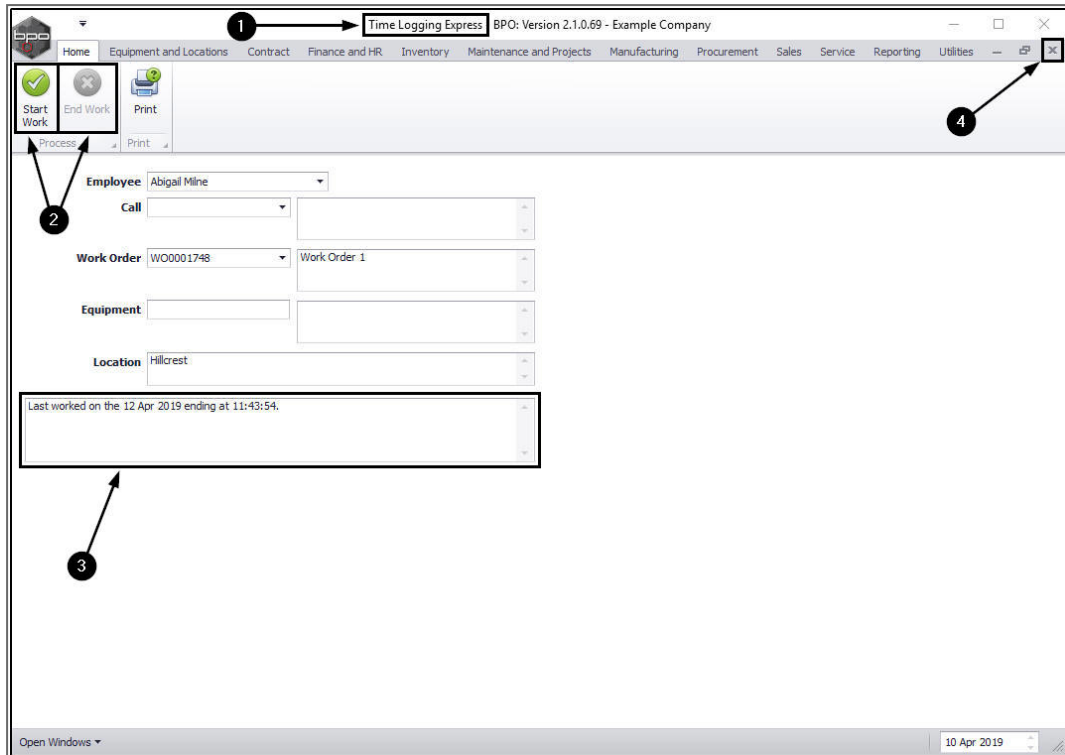


The **Close Open Work** screen will close.

1. The **Time Logging Express** screen will re-open.
2. The **Start Work** button will be active while the **End Work** button is greyed out.
3. The work status message will display as **Last worked on [] ending at []** (This will be the current date and time.)

Note: The work status message may also display as **Work started on work order [] on the []**, even though the **End Work** button was clicked on in the previous step.

4. **Close** the **Time Logging Express** screen.

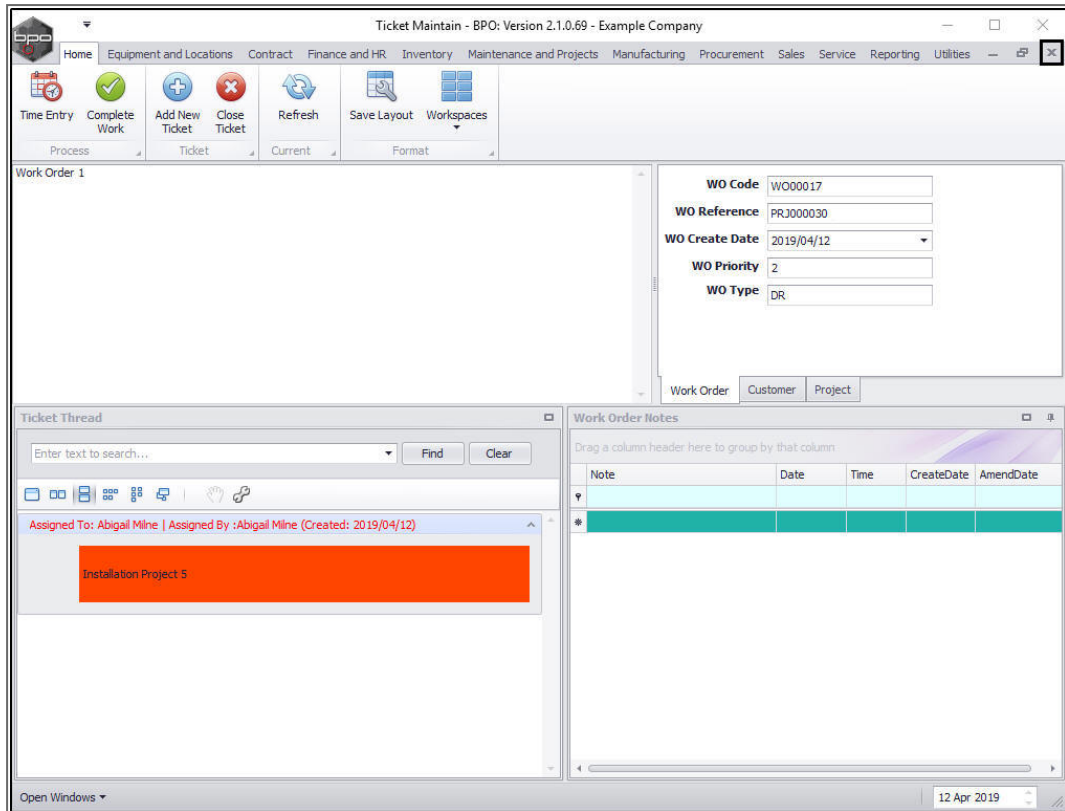


The screenshot shows the 'Time Logging Express' window. At the top, a menu bar includes 'Home', 'Equipment and Locations', 'Contract', 'Finance and HR', 'Inventory', 'Maintenance and Projects', 'Manufacturing', 'Procurement', 'Sales', 'Service', 'Reporting', 'Utilities', and a close button. Below the menu bar is a toolbar with 'Start Work' (green checkmark), 'End Work' (red X), and 'Print' (printer icon). The main form area contains several fields: 'Employee' (dropdown menu showing 'Abigail Milne'), 'Call' (dropdown menu), 'Work Order' (dropdown menu showing 'WO0001748'), 'Equipment' (text field), and 'Location' (dropdown menu showing 'Hillcrest'). Below these fields is a text area containing the text 'Last worked on the 12 Apr 2019 ending at 11:43:54,'. At the bottom left, there is a status bar with 'Open Windows' and a date/time display '10 Apr 2019'.

Numbered callouts in the image:

- 1: Points to the 'Time Logging Express' title bar.
- 2: Points to the 'Start Work' button.
- 3: Points to the text area showing the last worked on date and time.
- 4: Points to the close button in the top right corner.

The ***Ticket Maintain*** screen will be displayed. Close this screen.



Ticket Maintain - BPO: Version 2.1.0.69 - Example Company

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

Time Entry Complete Work Add New Ticket Close Ticket Refresh Save Layout Workspaces

Process Ticket Current Format

Work Order 1

WO Code: WO00017
 WO Reference: PRJ000030
 WO Create Date: 2019/04/12
 WO Priority: 2
 WO Type: DR

Work Order Customer Project

Ticket Thread

Enter text to search... Find Clear

Assigned To: Abigail Mihe | Assigned By: Abigail Mihe (Created: 2019/04/12)

Installation Project 5

Work Order Notes

Drag a column header here to group by that column

Note	Date	Time	CreateDate	AmendDate

Open Windows 12 Apr 2019

The **All Open Tickets** screen will be displayed. Here you can see that the work order has been removed from the list.

You can now decide whether or not to **print the work order report**.

CO3
TECHNOLOGIES

All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

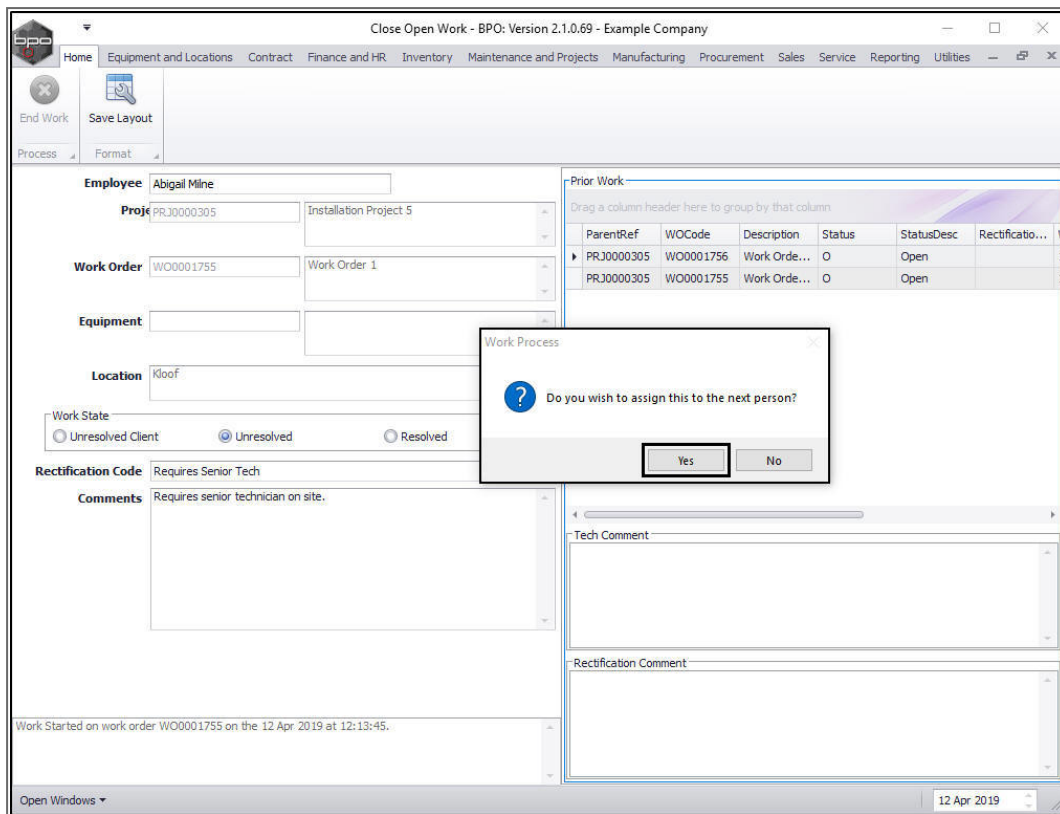
WOCCode	Description	WOType	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read
WO0001200	Unresolved,completed and rea...	DR	Select Call Type	2	Unresolved	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001202	Unresolved client, completed and r...	DR	Select Call Type	2	Unresolved client, completed and rea...	2017/03/30	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001202	Unresolved client, completed and r...	DR	Select Call Type	2	Unresolved	2017/03/30	Judith Mudzengi	Judith Mudzengi	N	Yes
WO0001207	Location - Unresolved client, compl...	DR	Select Call Type	2	Location - Unresolved client, complete...	2017/03/30	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001207	Location - Unresolved client, c...	DR	Select Call Type	2	Unresolved client	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001198	Resolved and reassigned	DR	Select Call Type	2	Resolved and reassigned	2017/03/30	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001198	Resolved and reassigned	DR	Select Call Type	2	Resolved and reassigned	2017/03/...	Judith Mudze...	Bianca Du Toit	N	No
WO0001213	work order linked to asset unresolv...	DR	Select Call Type	2	work order linked to asset unresolved...	2017/03/31	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001213	work order linked to asset unr...	DR	Select Call Type	2	Unresolved and reassigned	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001217	work order linked to location - resol...	DR	Select Call Type	2	work order linked to location - resolve...	2017/03/31	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001217	work order linked to location - ...	DR	Select Call Type	2	Location - resolved and reassign...	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001219	work order linked to location	DR	Select Call Type	2	work order linked to location	2017/03/31	Judith Mudzengi	Judith Mudzengi	N	Yes
WO0001226	Test ticketing time.	DR	Select Call Type	2	Test ticketing time.	2017/04/...	Bianca Du Toit	Bianca Du Toit	N	No
WO0001227	Test ticketing multiple time logs	DR	Select Call Type	2	Test ticketing multiple time logs	2017/04/03	Bianca Du Toit	Bianca Du Toit	N	Yes
WO0001311	A new assignment that needs to be...	DR	Select Call Type	2	A new assignment that needs to be f...	2017/04/20	Bianca Du Toit	Bianca Du Toit	N	Yes
WO0001395	Swap out WO from project	DR	Select Call Type	2	Swap Outs p rojects v2.1.0.5	2017/06/...	Judith Mudze...	Judith Mudzengi	N	No
WO0001212	work order linked to asset - re...	DR	Select Call Type	2	Resolved and reassigned	2017/03/...	Judith Mudze...	Belinda Sharman	N	No
WO0001212	work order linked to asset - resolve...	DR	Select Call Type	2	work order linked to asset - resolved ...	2017/03/31	Judith Mudzengi	Judith Mudzengi	C	Yes
WO0001746	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2019/04/...	Abigail Milne	Belinda Sharman	N	No
WO0001751	Installation Project 1	DR	Select Call Type	2	Installation Project 1	2019/04/...	Abigail Milne	Belinda Sharman	N	No
WO0001754	Installation Project 4	DR	Select Call Type	2	Installation Project 4	2019/04/...	Abigail Milne	Belinda Sharman	N	No

Count: 146

Open Windows 10 Apr 2019

End Work and Assign to the Next Person

- A **Work Process** message box will pop up asking;
 - **Do you wish to assign this to the next person?**
- Click on **Yes**.



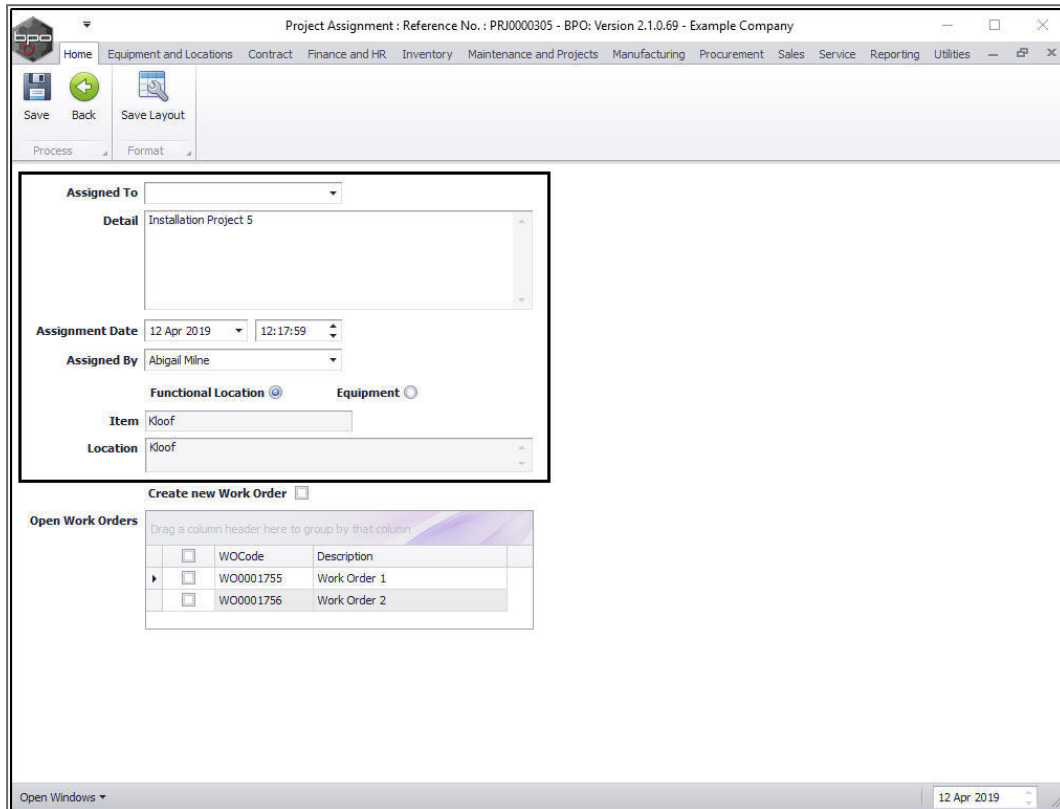
The screenshot shows the 'Close Open Work - BPO: Version 2.1.0.69 - Example Company' window. The main form contains fields for Employee (Abigail Mine), Project (PRJ0000305), Work Order (WO0001755), Equipment, Location (Kloof), Work State (Unresolved Client, Unresolved, Resolved), Rectification Code (Requires Senior Tech), and Comments (Requires senior technician on site). A 'Prior Work' table is visible on the right. A 'Work Process' dialog box is open in the center, asking 'Do you wish to assign this to the next person?' with 'Yes' and 'No' buttons.

ParentRef	WOCode	Description	Status	StatusDesc	Rectification...
PRJ0000305	WO0001756	Work Orde...	O	Open	
PRJ0000305	WO0001755	Work Orde...	O	Open	

The **Project Assignment** or **Call Assignment** screen will be displayed.

- **Assigned To** : Click on the drop-down arrow and select the person you wish to assign the work order to.
Note: You can assign the work order to yourself, if required. For example, if you wished to add information to the detail below.
- **Detail** : This will auto populate with the information linked to the work order but you can edit the text, if required.
- **Assignment Date** and **Time** : This will auto populate with the current date and time.
 - **Date** : Either type in or click on the drop-down arrow and use the calendar function to select an alternative date, if required.

- **Time** :Either type in or use the arrow indicators to select an alternative time, if required.
- **Assigned By** : This will auto populate with the person currently logged on to the system. You can click on the drop-down arrow and select an alternative person, if required.



You can now decide whether to **select an open work order** or whether to **create a new work order**.

Select Open Work Order(s)

Go to the **Open Work Orders** frame and select the relevant work order.

- **Important Note:** You cannot select the current work order (the one that you are ending work on). If you do, you will receive an **error** message as shown below.

Project Assignment : Reference No.: PRJ0000305 - BPO: Version 2.1.0.69 - Example Company

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

Save Back Save Layout

Process Format

Assigned To: Belinda Sharman

Detail: Installation Project 5

Assignment Date: 12 Apr 2019 12:17:59

Assigned By: Abigail Milne

Functional Location: Equipment

Item: Kloof

Location: Kloof

Create new Work Order ☐

Open Work Orders

Drag a column header here to group by that column	
WOCCode	Description
<input checked="" type="checkbox"/> WO0001755	Work Order 1
<input type="checkbox"/> WO0001756	Work Order 2

Net SqlClient Data Provider

The work order WO0001755 has been completed and a technician cannot be reassigned. Please assign to a new work order. The transaction ended in the trigger. The batch has been aborted.

OK

Open Windows 12 Apr 2019

- Click on the check box(es) in front of the **Open Work Order(s)** that you wish to designate to the **Assigned To** person.
 - In this example, **WO0001756** has been selected.
 - I have selected to assign it to myself.
- Click on **Save**.

Project Assignment : Reference No.: PRJ0000305 - BPO: Version 2.1.0.69 - Example Company

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

Save Back Save Layout

Process Format

Assigned To: Abigail Milne

Detail: Installation Project 5

Assignment Date: 12 Apr 2019 12:17:59

Assigned By: Abigail Milne

Functional Location Equipment

Item: Kloof

Location: Kloof

Create new Work Order ☐

Open Work Orders

Drag a column header here to group by that column:

	WOCCode	Description
<input type="checkbox"/>	WO0001755	Work Order 1
<input checked="" type="checkbox"/>	WO0001756	Work Order 2

Open Windows 12 Apr 2019

The **Time Logging Express** screen will be displayed. **Close** this screen.

Time Logging Express - BPO: Version 2.1.0.69 - Example Company

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

Start Work End Work Print

Process Print

Employee: Abigail Milne

Call: [Dropdown] [Text]

Work Order: WO0001755 Work Order: 1

Equipment: [Text] [Text]

Location: Kloof

Last worked on the 12 Apr 2019 ending at 12:17:09.

Open Windows 12 Apr 2019

The ***Ticket Maintain*** screen will be displayed. ***Close*** this screen.

Ticket Maintain - BPO: Version 2.1.0.69 - Example Company

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

Time Entry | Complete Work | Add New Ticket | Close Ticket | Refresh | Save Layout | Workspaces

Process | Ticket | Current | Format

Work Order 1

WO Code: WO0001755
 WO Reference: PRJ0000305
 WO Create Date: 2019/04/12
 WO Priority: 2
 WO Type: DR

Work Order | Customer | Project

Ticket Thread

Enter text to search... Find Clear

Assigned To: Abigail Mihe | Assigned By: Abigail Mihe (Created: 2019/04/12)

Installation Project 5

Work Order Notes

Drag a column header here to group by that column

Note	Date	Time	CreateDate	AmendDate

Open Windows 12 Apr 2019

The **All Open Tickets** screen will be displayed.

1. You will note that Work Order **WO0001755** has been removed from the list.
2. Work Order **WO0001756** has now been assigned.

All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCCode	Description	WOType	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
W00001537	1234	NDS	New Deal Sale	2	1234	2017/08/...	Bianca Du Toit	Ed Jones	N
W00001546	Machine service required - not...	SERV	Service	1	Machine service required - not s...	2017/08/...	Bianca Du Toit	Chris Haynes	N
W00001550	New deal rental contract	NDR	New Deal Rental	2	New deal rental contract	2017/08/...	Bianca Du Toit	Bianca Du Toit	N
W00001567	Return all from short term con...	DR	Select Call Type	2	Return all from short term contr...	2017/08/...	Bianca Du Toit	Ed Jones	N
W00001587	Service required - remember t...	TON	Toner Required	2	Service required - remember to ...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
W00001588	Service required - check on so...	TON	Toner Required	2	Service required - check on som...	2017/09/...	Bianca Du Toit	Chris Haynes	N
W00001590	Test Project for WebPortal bac...	DR	Select Call Type	2	Test Project for WebPortal back ...	2017/09/...	Bianca Du Toit	Bianca Du Toit	N
W00001591	RSI V1.27.0.0 - Issue - Part Cat...	DR	Select Call Type	2	RSI V1.27.0.0 - Issue - Part Cate...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
W00001596	I dont understand this at all	INST	Installation	2	I dont understand this at all	2017/10/...	Bianca Du Toit	Bianca Du Toit	N
W00001600	Test swap out with serialised s...	INSP	Inspection	2	Test swap out with serialised sto...	2017/10/...	Bianca Du Toit	Chris Haynes	N
W00001604	Site Inspection required	DR	Select Call Type	2	Machine Installation	2018/10/...	Abigail Milne	Theo Peterson	N
W00001626	Test new swap out process on te...	INST	Installation	3	Test new swap out process on te...	2018/01/...	Bianca Du Toit	Bianca Du Toit	N
W00001668	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N
W00001671	Machine faulty, loan unit requ...	REP	Repair	2	Machine faulty, loan unit request...	2018/07/...	Chris Haynes	Theo Peterson	N
W00001678	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Bianca Du Toit	Bianca Du Toit	N
W00001684	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N
W00001687	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N
W00001694	TT009 - Daily, Mono 1000 - Call...	SM	Scheduled Mai...	2	Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N
W00001746	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2019/04/...	Abigail Milne	Belinda Sharman	N
W00001751	Installation Project 1	DR	Select Call Type	2	Installation Project 1	2019/04/...	Abigail Milne	Belinda Sharman	N
W00001754	Installation Project 4	DR	Select Call Type	2	Installation Project 4	2019/04/...	Abigail Milne	Belinda Sharman	N
W00001756	Work Order 2	DR	Select Call Type	2	Installation Project 5	2019/04/...	Abigail Milne	Abigail Milne	N

Count: 147

Open Windows 12 Apr 2019

Create New Work Order

In the **Call Assignment** or **Project Assignment** screen,

1. Tick the **Create new Work Order** box if you wish to create a **new** work order that you will designate to the selected **Assigned To** person.
2. Click on **Save**.

Project Assignment : Reference No.: PRJ0000305 - BPO: Version 2.1.0.69 - Example Company

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

Save Back Save Layout

Process Format

Assigned To: Belinda Sharman

Detail: Installation Project 5

Assignment Date: 12 Apr 2019 13:08:25

Assigned By: Abigail Milne

Functional Location Equipment

Item: Kloof

Location: Kloof

Create new Work Order ☒

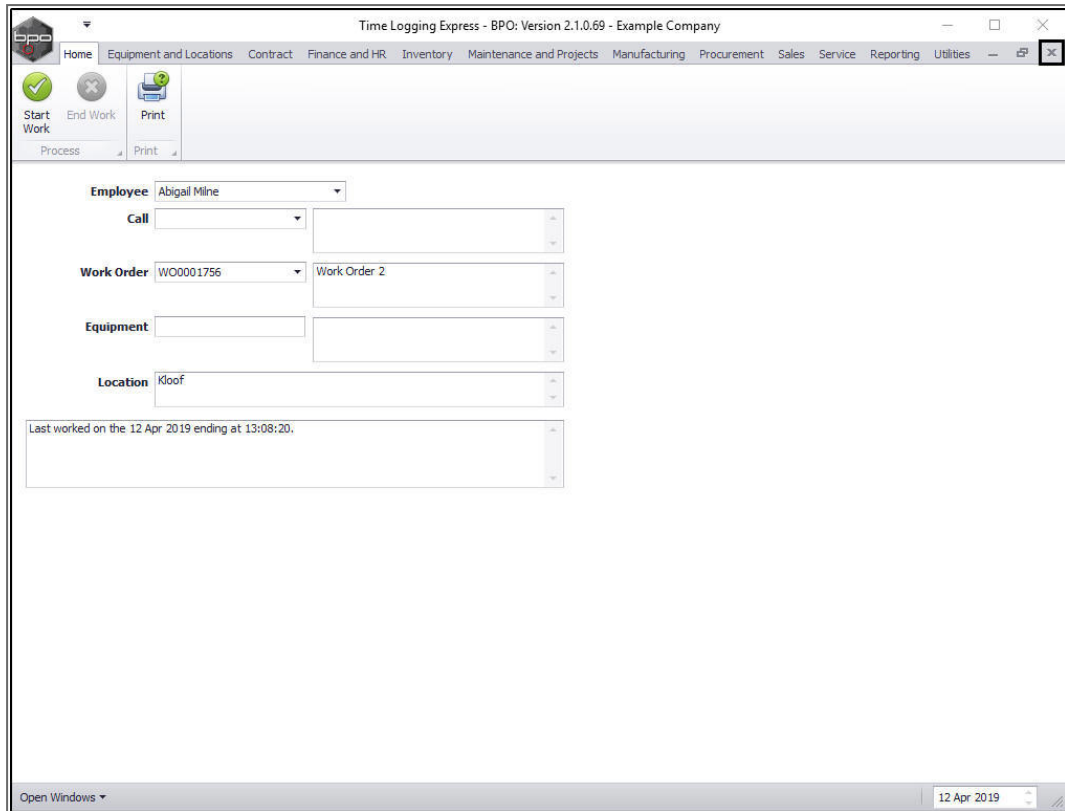
Open Work Orders

Drag a column header here to group by that column:

	WOCCode	Description
	WO0001755	Work Order 1
	WO0001756	Work Order 2

Open Windows 12 Apr 2019

- The **Call Assignment** or **Project Assignment** screen will close and the **Time Logging Express** screen will be displayed. **Close** this screen.



Time Logging Express - BPO: Version 2.1.0.69 - Example Company

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

Start Work End Work Print

Employee: Abigail Milne

Call:

Work Order: WO0001756 Work Order 2

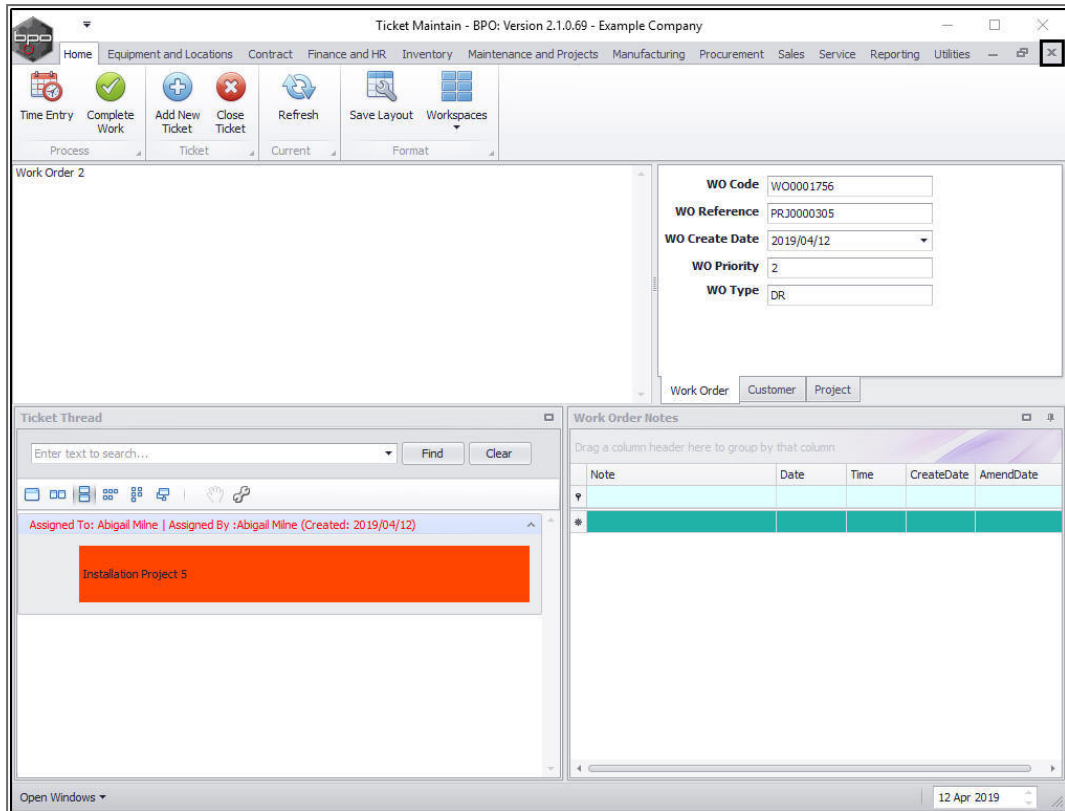
Equipment:

Location: Kloof

Last worked on the 12 Apr 2019 ending at 13:08:20.

Open Windows 12 Apr 2019

- The ***Ticket Maintain*** screen will be displayed. ***Close*** this screen.



The **All Open Tickets** screen will be displayed.

1. You will note that Work Order **WO0001756** has been removed from the list.
2. A new Work Order **WO0001757** has now been created.

CO3 All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCode	Description	WOType	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
WO0001537	1234	NDS	New Deal Sale	2	1234	2017/08/...	Bianca Du Toit	Ed Jones	N
WO0001546	Machine service required - not...	SERV	Service	1	Machine service required - not s...	2017/08/...	Bianca Du Toit	Chris Haynes	N
WO0001550	New deal rental contract	NDR	New Deal Rental	2	New deal rental contract	2017/08/...	Bianca Du Toit	Bianca Du Toit	N
WO0001567	Return all from short term con...	DR	Select Call Type	2	Return all from short term contr...	2017/08/...	Bianca Du Toit	Ed Jones	N
WO0001587	Service required - remember t...	TON	Toner Required	2	Service required - remember to ...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
WO0001588	Service required - check on so...	TON	Toner Required	2	Service required - check on som...	2017/09/...	Bianca Du Toit	Chris Haynes	N
WO0001590	Test Project for WebPortal bac...	DR	Select Call Type	2	Test Project for WebPortal back ...	2017/09/...	Bianca Du Toit	Bianca Du Toit	N
WO0001591	RSI V1.27.0.0 - Issue - Part Cat...	DR	Select Call Type	2	RSI V1.27.0.0 - Issue - Part Cate...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
WO0001596	I dont understand this at all	INST	Installation	2	I dont understand this at all	2017/10/...	Bianca Du Toit	Bianca Du Toit	N
WO0001600	Test swap out with serialised s...	INSP	Inspection	2	Test swap out with serialised sto...	2017/10/...	Bianca Du Toit	Chris Haynes	N
WO0001604	Site Inspection required	DR	Select Call Type	2	Machine Installation	2018/10/...	Abigail Milne	Theo Peterson	N
WO0001626	Test new swap out process on te...	INST	Installation	3	Test new swap out process on te...	2018/01/...	Bianca Du Toit	Bianca Du Toit	N
WO0001668	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N
WO0001671	Machine faulty, loan unit requ...	REP	Repair	2	Machine faulty, loan unit request...	2018/07/...	Chris Haynes	Theo Peterson	N
WO0001678	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Bianca Du Toit	Bianca Du Toit	N
WO0001684	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N
WO0001687	Return machine from contract...	DR	Select Call Type	2	Return all from short term contr...	2018/07/...	Abigail Milne	Theo Peterson	N
WO0001694	TT009 - Daily, Mono 1000 - Call...	SM	Scheduled Mai...	2	Scheduled Service	2018/08/...	Abigail Milne	Belinda Sharman	N
WO0001746	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2019/04/...	Abigail Milne	Belinda Sharman	N
WO0001751	Installation Project 1	DR	Select Call Type	2	Installation Project 1	2019/04/...	Abigail Milne	Belinda Sharman	N
WO0001754	Installation Project 4	DR	Select Call Type	2	Installation Project 4	2019/04/...	Abigail Milne	Belinda Sharman	N
WO0001757	Installation Project 5	DR	Select Call Type	2	Installation Project 5	2019/04/...	Abigail Milne	Belinda Sharman	N

Count: 147

Open Windows 2

12 Apr 2019

PRINT WORK ORDER REPORT

- In the **All Open Tickets** screen, select the ticket you wish to print the **Work Order Report** for.
 - In this image, **DWO0001668** is selected.
- Click on **Edit**.

Note 1: You can also do this process once you have **started** or **ended** work in the **Time Logging Express** screen.

Note 2: If you have not yet **started work** on the selected work order, the Work Order Report will be blank.

All Open Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WOCCode	Description	WOType	WOTypeDesc	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
W00001376	Loan Unit - Project v2.1.0.5	DR	Select Call Type	2	Project Assigned to you	2017/05/...	Judith Mudze...	Judith Mudzengi	N
W00001399	Project Assignment test	DR	Select Call Type	2	Project assigned to you	2017/05/...	Judith Mudze...	Judith Mudzengi	N
W00001527	Work Order to test financial po...	DR	Select Call Type	2	Work Order to test financial post...	2017/07/...	Bianca Du Toit	Belinda Sharman	N
W00001533	Time logging checks - with initi...	DR	Select Call Type	2	Time logging checks - with initial...	2017/07/...	Bianca Du Toit	Bianca Du Toit	N
W00001534	Time log test with auto schedu...	DR	Select Call Type	2	Time log test with auto scheduli...	2017/07/...	Bianca Du Toit	Bianca Du Toit	N
W00001535	Auto Scheduling time entry che...	DR	Select Call Type	2	Auto Scheduling time entry chec...	2017/07/...	Bianca Du Toit	Bianca Du Toit	N
W00001590	Test Project for WebPortal bac...	DR	Select Call Type	2	Test Project for WebPortal back ...	2017/09/...	Bianca Du Toit	Bianca Du Toit	N
W00001591	RSI V1.27.0.0 - Issue - Part Cat...	DR	Select Call Type	2	RSI V1.27.0.0 - Issue - Part Cate...	2017/09/...	Bianca Du Toit	Belinda Sharman	N
W00001604	Site Inspection required	DR	Select Call Type	2	Machine Installation	2018/10/...	Abigail Milne	Theo Peterson	N
W00001668	SP240 New Deal.	DR	Select Call Type	2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N
W00000593	Reorder Grids and rename captions	DR	Select Call Type	2	Reorder Grids and rename captions	2015/09/23	Bianca Du Toit	Bianca Du Toit	N
W00000595	test work order for project without ...	DR	Select Call Type	2	test work order for project without cu...	2015/09/25	Bianca Du Toit	Bianca Du Toit	N
W00000608	Check 2nd assignment	DR	Select Call Type	2	Check 2nd assignment	2015/10/07	Bianca Du Toit	Bianca Du Toit	N
W00000612	Test assignment delete	DR	Select Call Type	2	Test assignment delete	2015/10/15	Bianca Du Toit	Bianca Du Toit	C
W00000612	Test assignment delete	DR	Select Call Type	2	test	2017/12/...	Bianca Du Toit	Bianca Du Toit	N
W00000638	Test project assignment	DR	Select Call Type	2	Tech v1.3.0.4 - project assignment fix	2015/11/13	Bianca Du Toit	Bianca Du Toit	N
W00000666	Work Order A - subcon requests	DR	Select Call Type	2	Work Order A - subcon requests	2015/11/19	Bianca Du Toit	Bianca Du Toit	C
W00000666	Work Order A - subcon requests	DR	Select Call Type	2	TEST	2017/03/...	Bianca Du Toit	Belinda Sharman	N
W00000667	Work Order B: Subcon Requests	DR	Select Call Type	2	Work Order B: Subcon Requests	2015/11/...	Bianca Du Toit	Bianca Du Toit	N
W00000680	Work order with serial number	DR	Select Call Type	2	Project with serial number	2015/12/...	Bianca Du Toit	Bianca Du Toit	N

Count: 146

Open Windows 12 Apr 2019

The **Ticket Maintain** screen will be displayed.

- Click on **Time Entry**.

Ticket Maintain - BPO: Version 2.1.0.69 - Example Company

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

Time Entry Complete Work Add New Ticket Close Ticket Refresh Save Layout Workspaces

Process Ticket Current Format

SP240 New Deal.

WO Code: WO0001668
 WO Reference: PRJ00000071
 WO Create Date: 2018/05/24
 WO Priority: 2
 WO Type: DR

Work Order Customer Project

Ticket Thread

Enter text to search... Find Clear

Assigned To: Abigail Milne | Assigned By :Abigail Milne (Created: 2018/05/24)

SP240 New Deal.

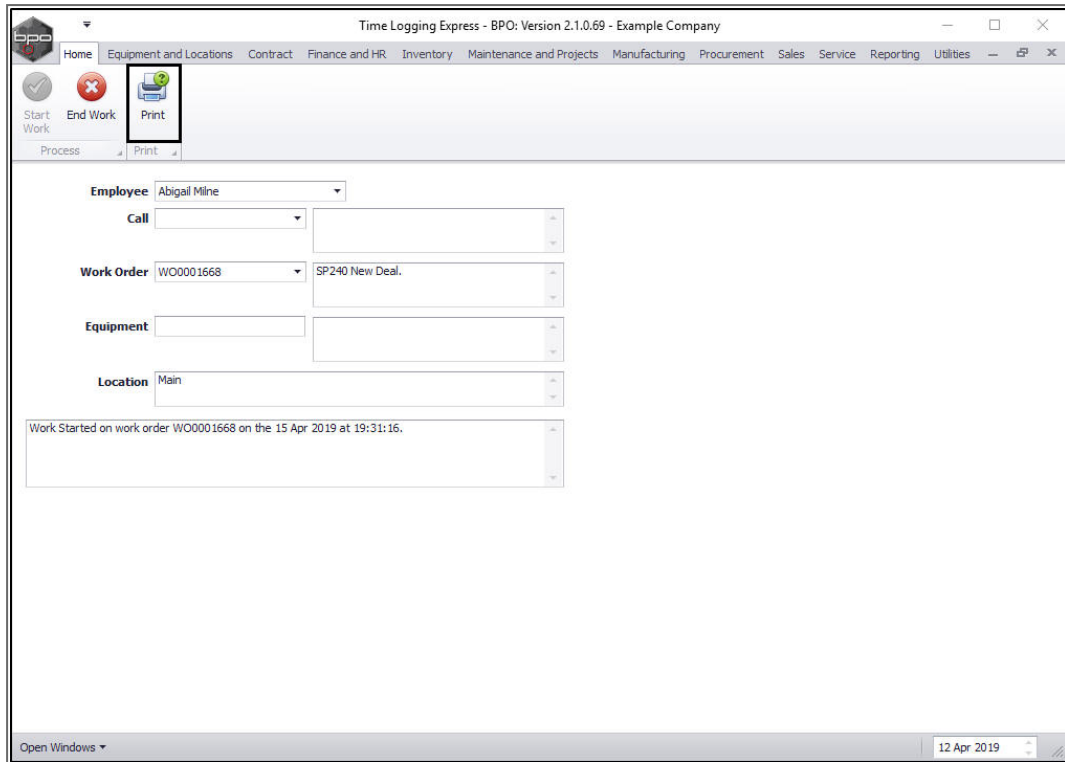
Work Order Notes

Drag a column header here to group by that column

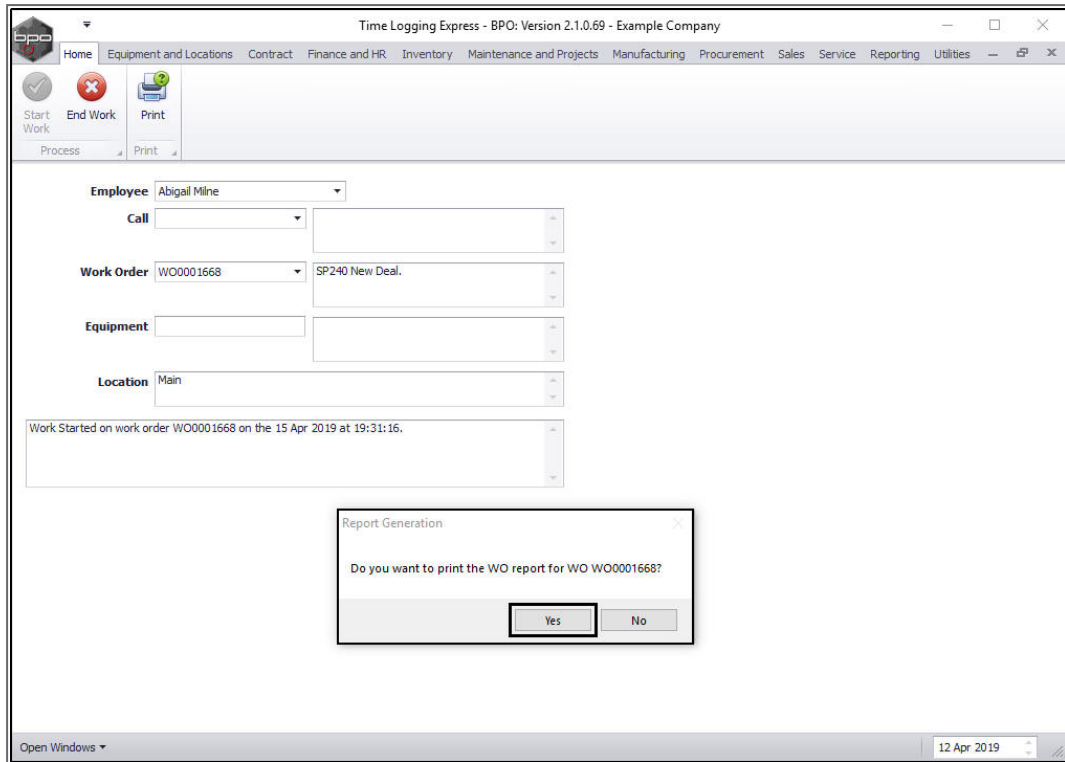
Note	Date	Time	CreateDate	AmendDate

Open Windows 12 Apr 2019

- The **Time Logging Express** screen will be displayed.
- Click on **Print**.

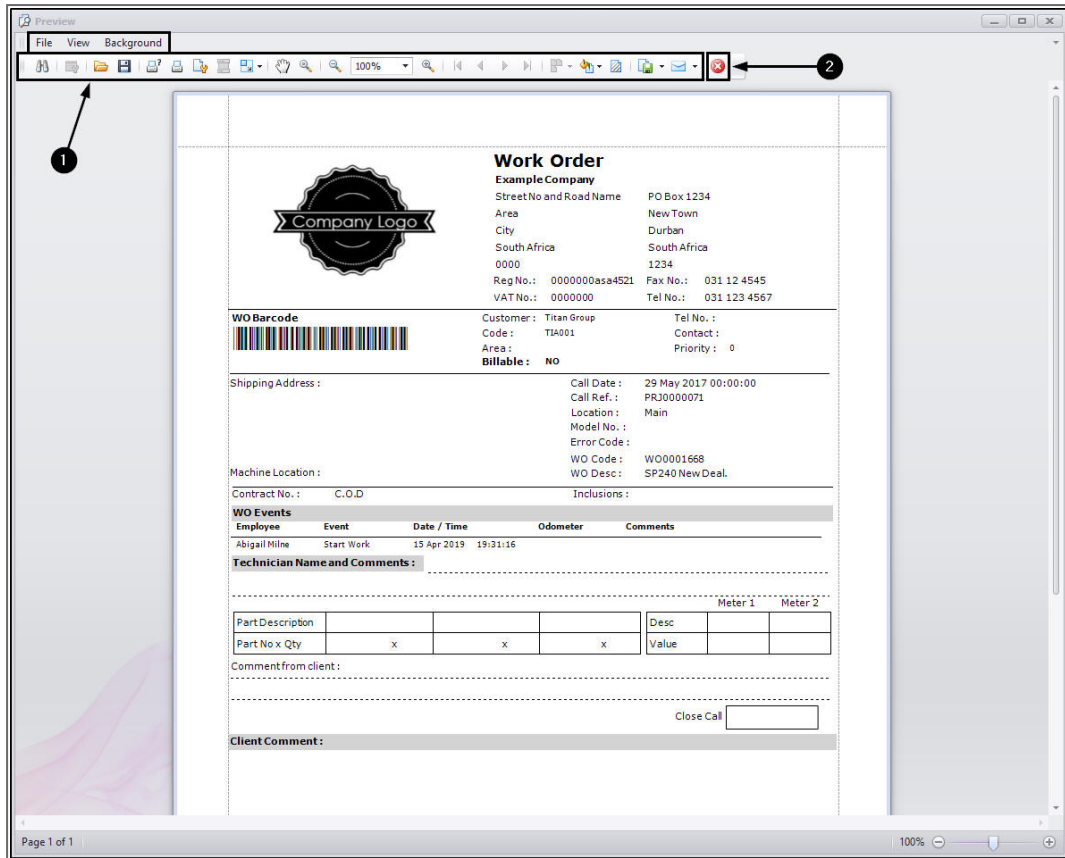


- A **Report Generation** message box will pop up asking;
 - **Do you want to print the WO Report for WO []?**
- Click on **Yes**.




The **Report Preview** screen will be displayed.

1. From here, you can **View, Print, Export** or **Email** the Work Order Report.
2. **Close** the Report Preview screen when you are done.



Work Order
Example Company
 Street No and Road Name: PO Box 1234
 Area: New Town
 City: Durban
 South Africa: South Africa
 0000: 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

WO Barcode


Customer: Titan Group Tel No.:
 Code: TIA001 Contact:
 Area: Priority: 0
Billable: NO

Shipping Address:
 Call Date: 29 May 2017 00:00:00
 Call Ref.: PRJ0000071
 Location: Main
 Model No.:
 Error Code:
 WO Code: WO0001668
 WO Desc: SP240 New Deal.

Machine Location:
 Contract No.: C.O.D Inclusions:

WO Events

Employee	Event	Date / Time	Odometer	Comments
Abigail Milne	Start Work	15 Apr 2019 19:31:16		

Technician Name and Comments:

Part Description	Part No x Qty	x	x	x	Meter 1		Meter 2	
					Desc	Value	Desc	Value
Comment from client:					Close Call			

Client Comment:

COMPLETE WORK

You can use this functionality once your work has been completed, or if you can no longer continue with the work, for example there is a **'Parts Requirement'** or you are **'Awaiting Client Confirmation'**.

- Select the ticket you wish to complete work for.
- Click on **Edit**.
 - In this image, **DWO0000242** is selected.

All Open Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit | Save Layout | Workspaces | Save Filter | Refresh | Export

Process | Format | Current | Export

Drag a column header here to group by that column

WOCODE	Description	WOTYPEDESC	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
DW00000239	TT072 - 2 Monthly - Call per WO	Scheduled Maintenance	2	Please resolve th...	2019/03/12	Judith Mudzengi	James Magombo	N
DW00000257	Parial Issue	Select Call Type	2	Parial Issue	2017/11/23	Judith Mudzengi	Belinda Sharmane	N
DW00000233	Project Invoices	Select Call Type	2	Project Invoices ...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DW00000254	new deal project rental	New Deal Rental	2	new deal project re...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DW00000242	TT033 - Daily Colour 1000 - Gener...	Scheduled Maintenance	2	TT033 - Daily Col...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DW00000265	TT033 - Daily Colour 1000 - Gener...	Select Call Type	2	TT033 - Daily Col...	2017/11/29	Judith Mudzengi	Belinda Sharmane	N
DW00000232	Project - Quotes	Select Call Type	2	Project - Quotes ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DW00000266	Project Assignment Test 1	Select Call Type	2	Project Assignment ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	N
DW00000273	Auto Apply Task Configuration to ...	Select Call Type	2	Auto Apply Task ...	2018/01/16	Judith Mudzengi	James Magombo	N
DW00000004	1234	New Deal Sale	2	1234	2017/11/03	Judith Mudzengi	Judith Mudzengi	C
DW00000004	1234	New Deal Sale	2	1234	2018/02/11	Judith Mudzengi	Judith Mudzengi	N
DW00000165	2. Stock Procurement for Client D...	Select Call Type	2	2. Stock Procure...	2018/09/21	Judith Mudzengi	Judith Mudzengi	C
DW00000165	2. Stock Procurement for Client Deman...	Select Call Type	2	2. Stock Procureme...	2018/09/21	Judith Mudzengi	Belinda Sharmane	N
DW00000264	Project Work Order - Pretoria	Select Call Type	2	Project Work Order ...	2017/11/29	Judith Mudzengi	Judith Mudzengi	C
DW00000264	Project Work Order - Pretoria	Select Call Type	2	Carry out schedul...	2019/03/13	Judith Mudzengi	Belinda Sharmane	N

Count: 44

Open Windows | 15 Mar 2019

- The **Ticket Maintain** screen will be displayed.
- Click on **Complete Work**.

Ticket Maintain - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Time Entry | Complete Work | Add New Ticket | Close Ticket | Refresh | Save Layout | Workspaces

Process | Ticket | Current | Format

TT033 - Daily Colour 1000 - Generate Project

WO Code: DW00000242
 WO Reference: PRJ0000030
 WO Create Date: 2017/11/06
 WO Priority: Customer

Ticket Thread

Enter text to search... Find Clear

Assigned To: Judith Mudzengi | Assigned By: Judith Mudzengi (Created: 2017/11/29)

TT033 - Daily Colour 1000 - Generate Project

Work Order Notes

Drag a column header here to group by that column

Note	Date	Time	CreateDate

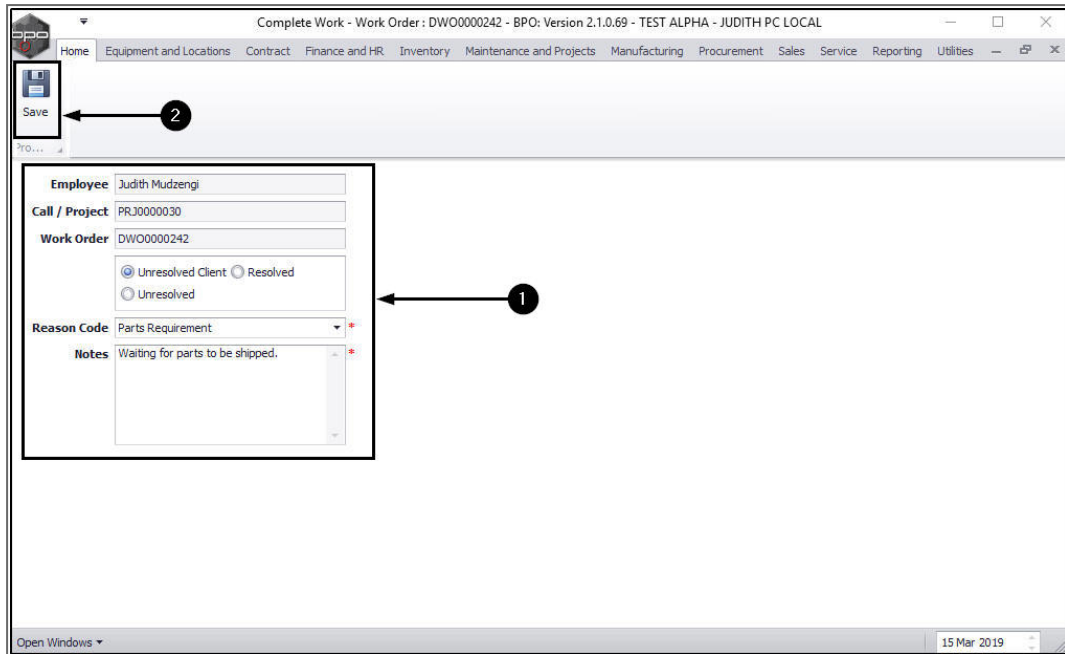
Open Windows | 15 Mar 2019

The **Complete Work - Work Order: []** screen will be displayed.

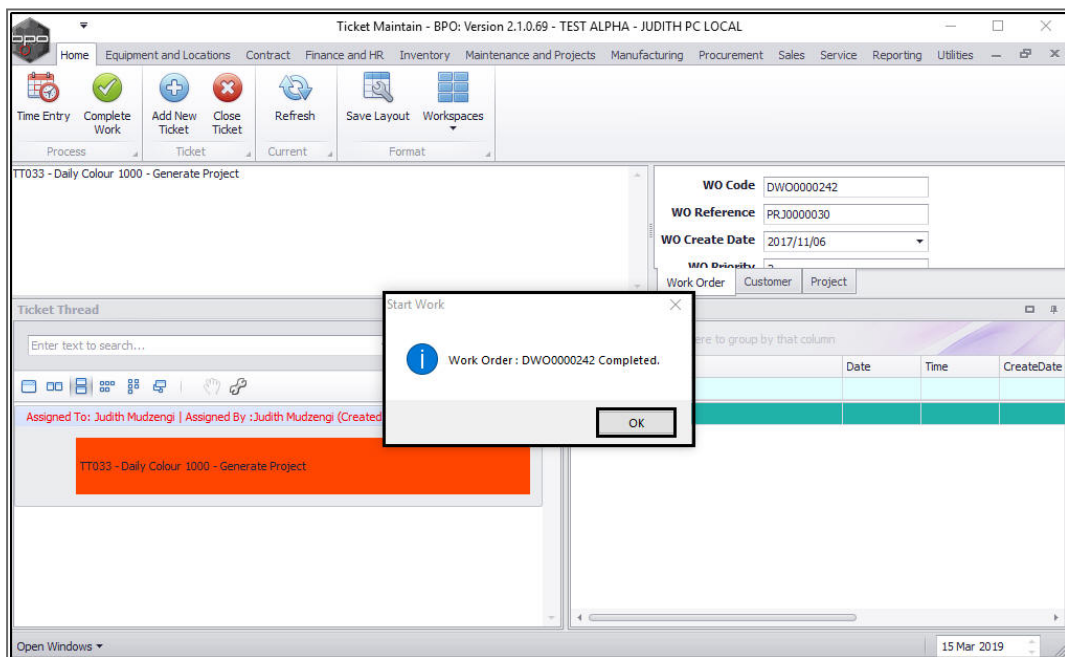
1. Complete Work Details:

- **Employee:** This will auto populate with the name of the employee currently logged onto the system.
- **Call/Project:** This will auto populate with the call/- project number if the work order is linked to a project or call.
- **Work Order:** This will auto populate with the work order number.
- **Resolution Actions:** Select one of the 3 resolution actions
 - **Resolved** - once processed, this call will move to **Complete**.
 - **Unresolved** - once processed, this call will move to **Pending**.
 - **Unresolved (Client)** - once processed, this call will move to **On Hold**.
- **Reason Code:** Click on the down arrow and select the reason code.
- **Notes:** Type in the relevant notes.

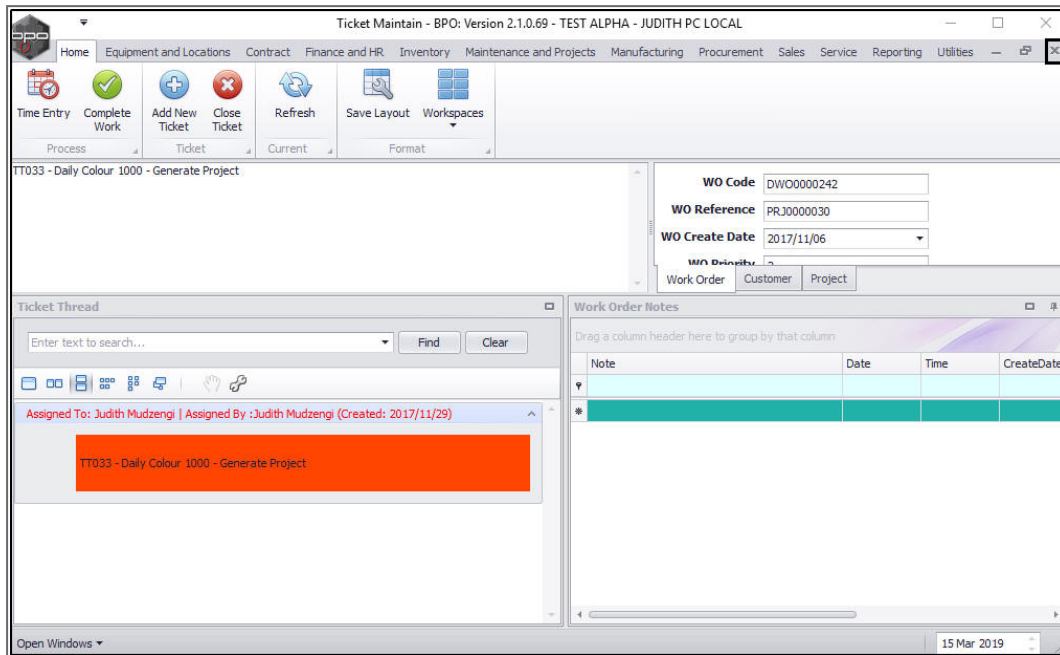
2. Click on **Save**.



- A **Start Work** message box will pop up informing you that;
 - **Work Order: [] Completed.**
- Click on **OK**.



- The **Start Work** message box will close.
- **Exit** this screen.



CLOSE TICKET

Once all work has been completed, a **ticket thread** can be closed.

- Select the ticket you wish to complete work for.
 - In this image, **DWO0000170** was selected.
- Click on **Edit**.

CO3 BPO Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit | Save Layout | Workspaces | Save Filter | Refresh | Export

Process | Format | Current | Export

Drag a column header here to group by that column

WOCODE	Description	WOTYPEDESC	Priority	Note	CreateDate	CreateBy	AssignedTo	Status
DWO0000066	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/07/12	Judith Mudzengi	James Magombo	N
DWO0000067	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	Scheduled Service	2017/07/12	Judith Mudzengi	James Magombo	N
DWO0000106	asset on contract- return	New Deal Rental	2	asset on contract...	2017/08/04	Judith Mudzengi	James Magombo	N
DWO0000107	TT008 - Mono 1000, Colour 1000 - ...	Scheduled Maintenance	2	TT008 - Mono 10...	2017/08/04	Judith Mudzengi	Belinda Sharmane	N
DWO0000108	TT009 - Daily, Mono 1000 - Call p...	Scheduled Maintenance	2	TT009 - Daily, Mo...	2017/08/04	Judith Mudzengi	James Magombo	N
DWO0000109	TT002 - Weekly - Call per WO	Scheduled Maintenance	2	TT002 - Weekly - ...	2017/08/04	Judith Mudzengi	James Magombo	N
DWO0000110	TT003 - Monthly - Call per WO	Scheduled Maintenance	2	TT003 - Monthly ...	2017/08/04	Judith Mudzengi	James Magombo	N
DWO0000133	3MS - 3 Month Service	Scheduled Maintenance	2	Scheduled Service	2017/09/18	Judith Mudzengi	John Smith	N
DWO0000170	Third Party Procurement	Service	2	Third Party Procure...	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000169	Deliveries - change unit cost	Repair	2	Deliveries - chan...	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000150	ndrsa	New Deal Rental	2	ndrsa	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000149	ndrmg	New Deal Rental	2	ndrmg	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000140	nds	New Deal Sale	2	nds	2017/10/24	Judith Mudzengi	Judith Mudzengi	N
DWO0000204	nds	New Deal Sale	2	nds	2017/10/24	Judith Mudzengi	Belinda Sharmane	N
DWO0000240	TT013 - Weekly Colour 1000 - Call per ...	Scheduled Maintenance	2	Scheduled Service	2017/11/06	Judith Mudzengi	Judith Mudzengi	N

Count: 40

Open Windows | 15 Mar 2019

- The **Ticket Maintain** screen will be displayed.
- Click on **Close Ticket**.

CO3 BPO Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Time Entry | Complete Work | Add New Ticket | **Close Ticket** | Refresh | Save Layout | Workspaces

Process | Ticket | Current | Format

Third Party Procurement

WO Code: DWO0000170
 WO Reference: DCN0000065
 WO Create Date: 2017/10/12
 WO Priority: Work Order | Customer | Call

Ticket Thread

Enter text to search... Find Clear

Assigned To: Judith Mudzengi | Assigned By: Judith Mudzengi (Created: 2017/10/24)

Third Party Procurement

Work Order Notes

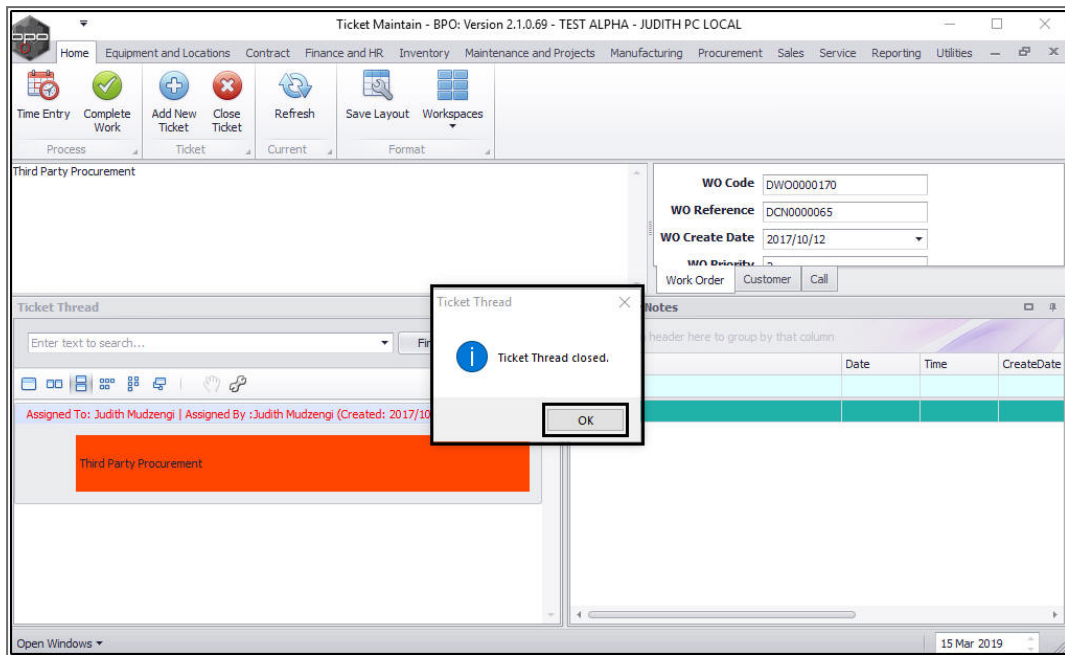
Drag a column header here to group by that column

Note	Date	Time	CreateDate

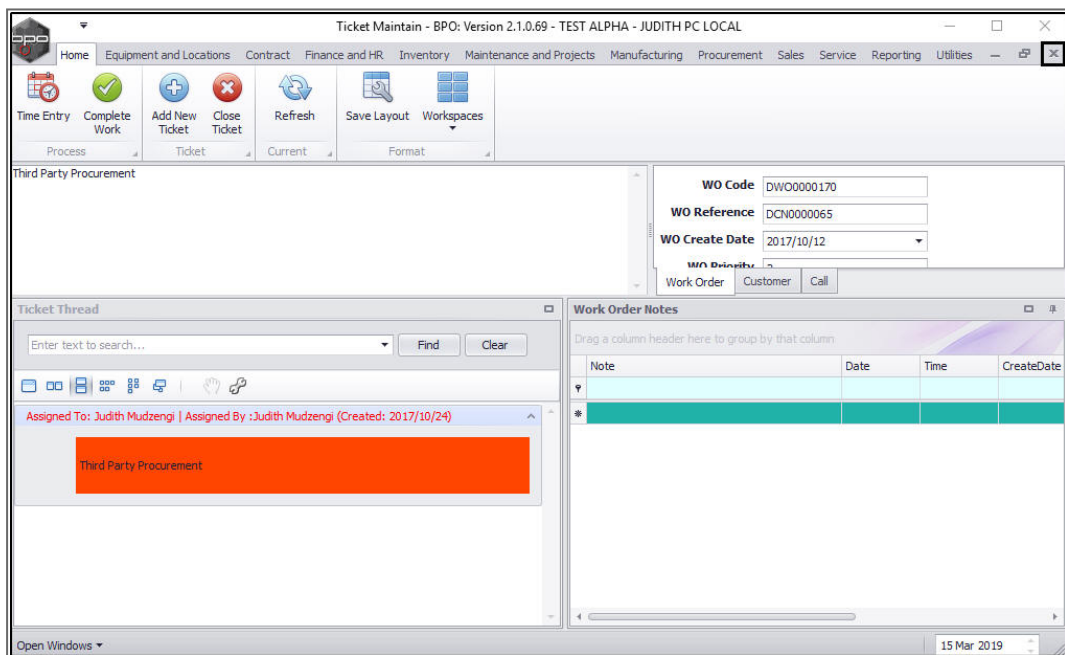
Open Windows | 15 Mar 2019

- A **Ticket Thread** message will pop up informing you that;
- **Ticket Thread closed.**

- Click on **Ok**.

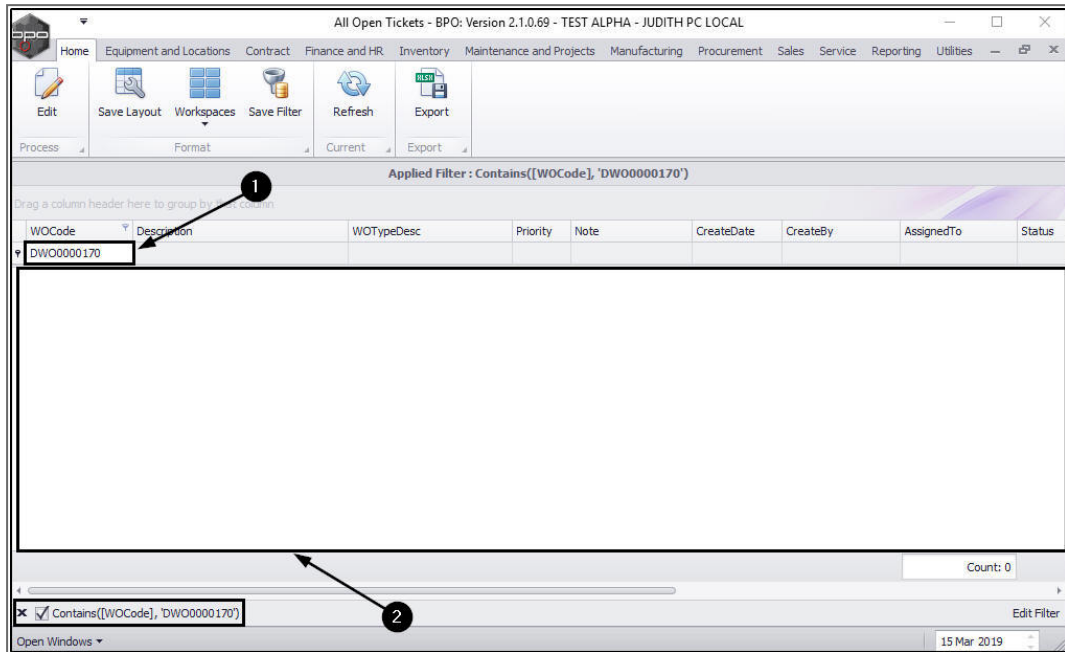


- The **Ticket Thread** message box will close.
- **Exit** the screen.



The ticket will no longer be displayed in the **All Open Tickets** screen.

1. In this example, the **filter row** has been used to search for the closed ticket thread but the data grid no longer contains that ticket.



Related References

- [My Tickets](#)

CAP.001.001