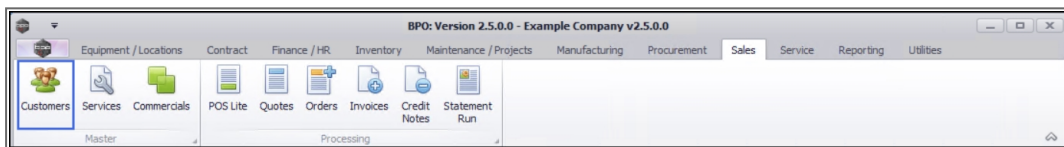


SALES

CUSTOMERS - CALL HISTORY

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

Ribbon Access: Sales > Customers



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

Customer Listing - BPO: Version 2.4.0.11 - Example Company

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

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

Processing Format Status Processing Current Refresh Export Reports Print Statement

Links Enter text to search...

Functions Notes Contacts Addresses Documents Call History Project History History Equipment

CustomerCode CustomerType CustomerName Department DeptName SiteDescription CustomerCreditLimit CustomerWebSite CustomerPhoneNumber CustomerVATNo

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

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

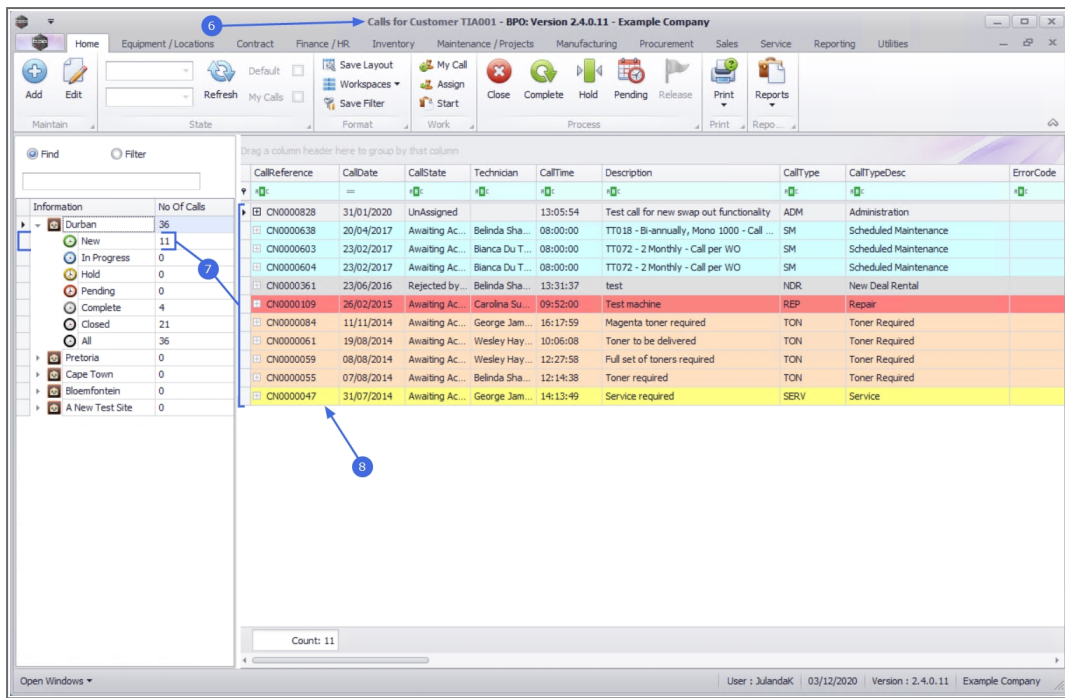
6. The **Calls for Customer** [customer code] screen will display.

CALLS DATA GRID

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



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



INFORMATION PANEL

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

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

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

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

Find | Filter

Information | No Of Calls

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

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

Count: 21

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

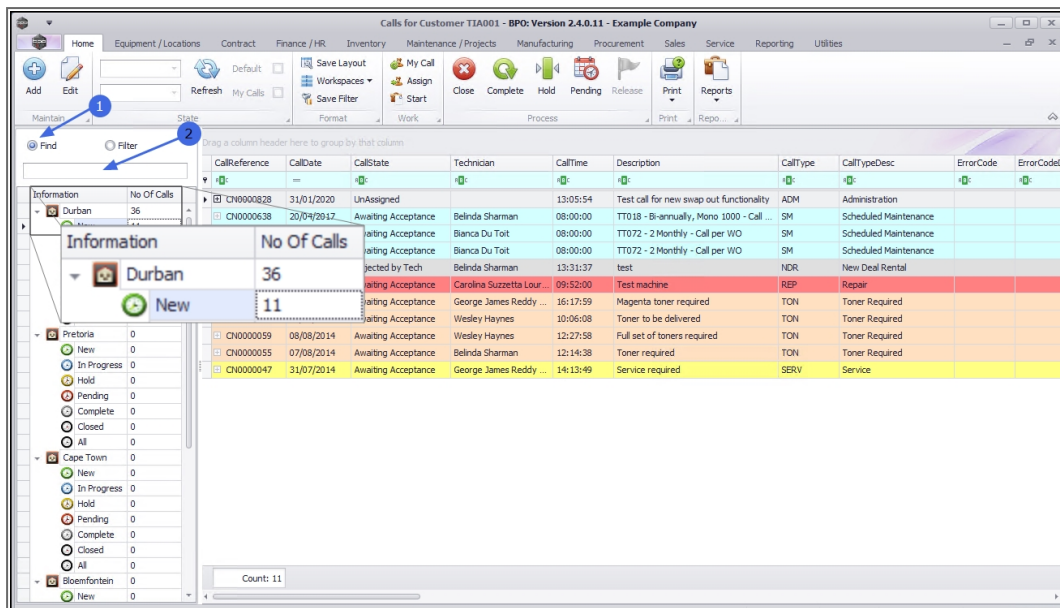
FIND OPTION

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

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



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



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
CN00000828	31/01/2020	UnAssigned	Belinda Sharman	13:05:54	Test call for new swap out functionality	ADM	Administration		
CN0000638	20/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT018 - Bi-annually, Mono 1000 - Call ...	SM	Scheduled Maintenance		
		Awaiting Acceptance	Belinda Sharman	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
		Awaiting Acceptance	Belinda Sharman	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
		Rejected by Tech	Belinda Sharman	13:31:37	test	NDR	New Deal Rental		
		Awaiting Acceptance	Carolina Suzzetta Lou...	09:52:00	Test machine	REP	Repair		
		Awaiting Acceptance	George James Reddy ...	16:17:59	Magenta toner required	TON	Toner Required		
		Awaiting Acceptance	Wesley Haynes	10:06:08	Toner to be delivered	TON	Toner Required		
		Awaiting Acceptance	Wesley Haynes	12:27:58	Full set of toners required	TON	Toner Required		
		Awaiting Acceptance	Belinda Sharman	12:14:38	Toner required	TON	Toner Required		
		Awaiting Acceptance	George James Reddy ...	14:13:49	Service required	SERV	Service		

3. The example is set to search for **CN0000222**.

- The system has filtered for this Call Reference number and selected it.

4. The search has resulted in the Call being located in the **Closed** status.



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

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

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

Default Refresh My Calls Save Layout Workspaces Assign My Call Close Complete Hold Pending Release Process Print Reports

Find Filter

CH0000222

Information No Of Calls

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

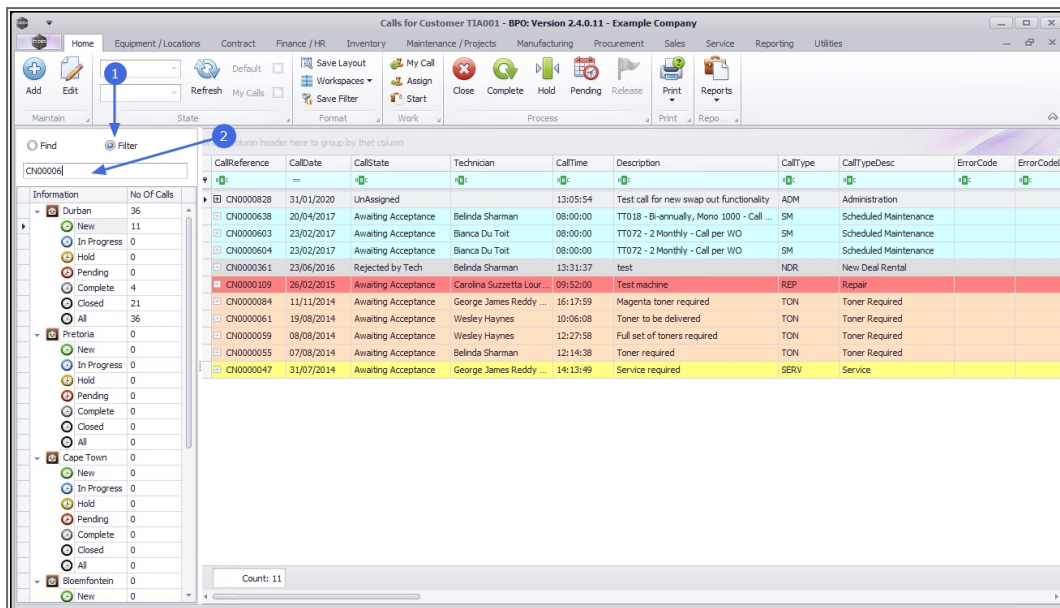
CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
CH0000367	07/09/2016	Rejected by Tech	Bianca Du Toit	13:23:40	Work flow test	REP	Repair	EC	Error Code
CH0000366	07/09/2016	Rejected by Tech	Bianca Du Toit	10:56:03	Work flow notification email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

Count: 21

FILTER OPTION

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

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



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorDesc
CN00000828	31/01/2020	UnAssigned		13:05:54	Test call for new swap out functionality	ADM	Administration		
CN00000638	20/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT018 - Bi-annually, Mono 1000 - Call ...	SM	Scheduled Maintenance		
CN00000603	23/02/2017	Awaiting Acceptance	Blanca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
CN00000604	23/02/2017	Awaiting Acceptance	Blanca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
CN00000361	23/06/2016	Rejected by Tech	Belinda Sharman	13:31:37	test	NDR	New Deal Rental		
CN00000109	26/02/2015	Awaiting Acceptance	Carolina Suzzetta Lou...	09:53:00	Test machine	REP	Repair		
CN00000084	11/11/2014	Awaiting Acceptance	George James Reddy ...	16:17:59	Magenta toner required	TON	Toner Required		
CN00000061	19/08/2014	Awaiting Acceptance	Wesley Haynes	10:06:08	Toner to be delivered	TON	Toner Required		
CN00000059	08/08/2014	Awaiting Acceptance	Wesley Haynes	12:27:58	Full set of toners required	TON	Toner Required		
CN00000055	07/08/2014	Awaiting Acceptance	Belinda Sharman	12:14:38	Toner required	TON	Toner Required		
CN00000047	31/07/2014	Awaiting Acceptance	George James Reddy ...	14:13:49	Service required	SERV	Service		

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



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

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

Applied Filter: [CallReference] Like 'CN00006%'

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

Count: 3

Open Windows

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

LOG A CALL

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

6

8

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

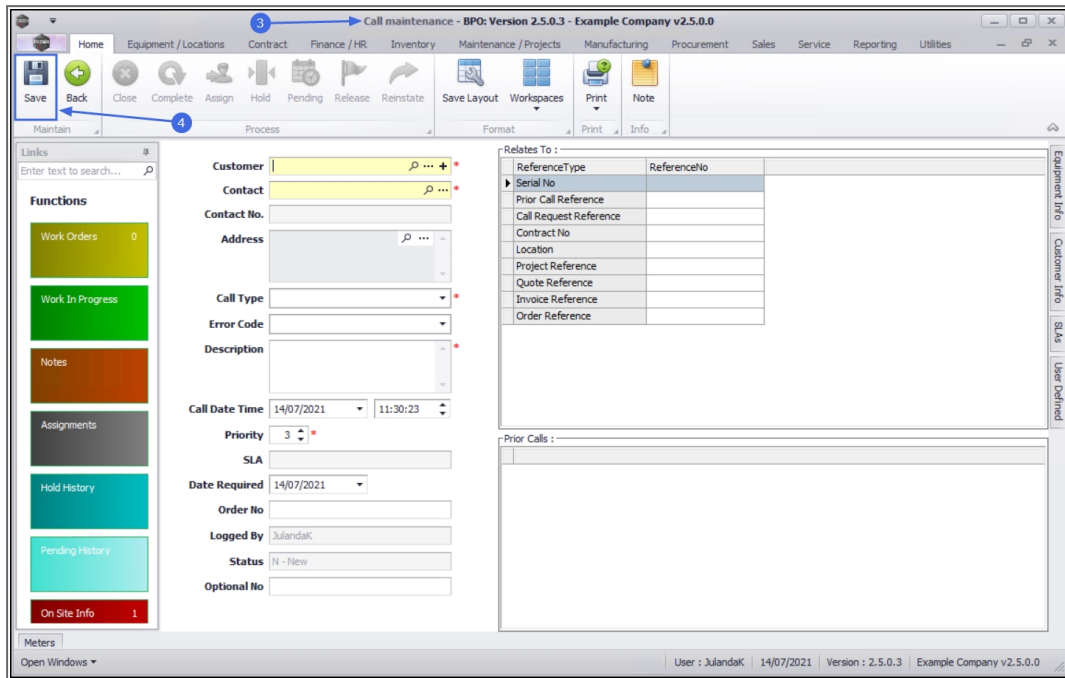
CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH00000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration
CH00000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CH00000800	15/11/2018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

Count: 31

Open Windows

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

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



EDIT A CALL

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

5. "Call Details" on page 4

6. Make the necessary changes to the Call information and click on **Save**.

STATE PANEL

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

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

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

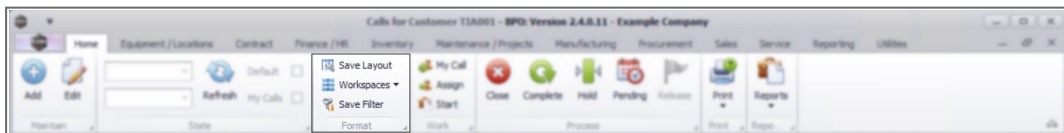


FORMAT PANEL

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



For a detailed handling of this topic refer to [BPO2 Data Grid Layouts](#)



MY CALL

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



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

4. Click on **My Call**.

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

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

Input Validation

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

Yes No

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

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

8. Click on **OK**.

Call Processing

Ownership of call, reference CN0000817, has been successful.

OK

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

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

ASSIGN A CALL

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

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

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

- Click on **Assign**.

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

2. Find Filter

3. Drag a column header here to group by that column

4. My Call Assign Start

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

Count: 31

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

5. "The Call Assignment: Reference No: [call ref number] screen will be displayed." on page 4

6. Complete the Call Assignment information and click **Save** when done.

5. Call Assignment : Reference No.: CN0000801 - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

6. Save Back Save Layout View Call

Assigned To: [Dropdown]

Detail: Call against a short term contract.

Assignment Date: 14/07/2021 14:25:05

Assigned By: Julanda Kessler

Create new Work Order ☐

Open Work Orders

WOCode	Description
WO0002279	Call against a short term contract.

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

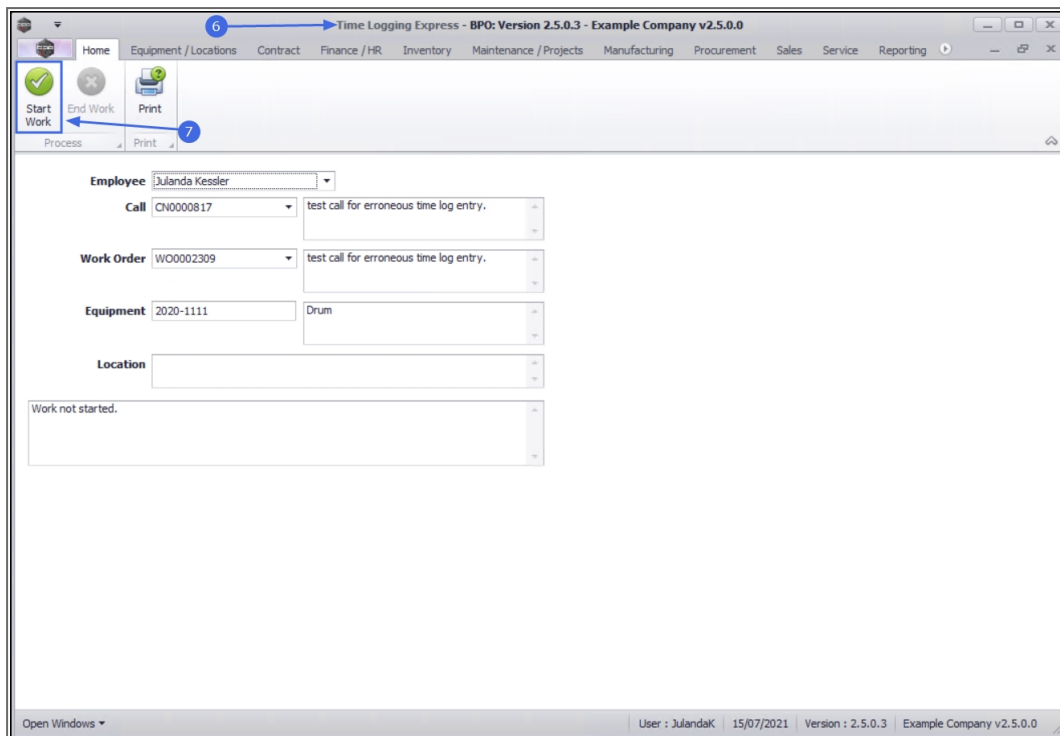
START WORK

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

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

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

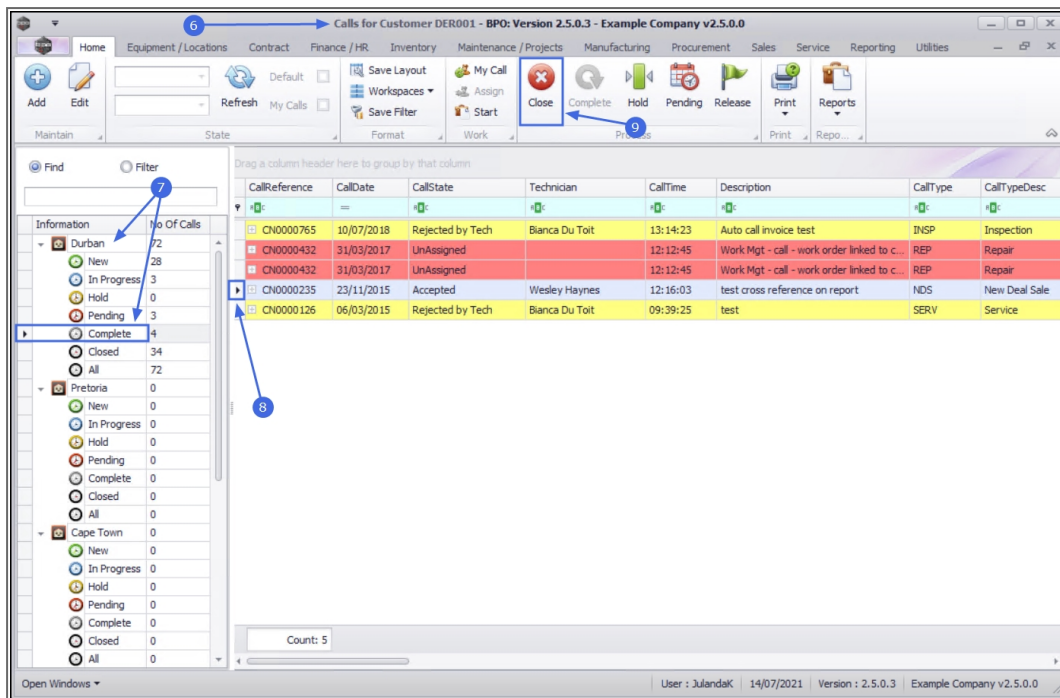
6. "The Time Logging Express screen will be displayed." on page 3
7. Complete the Time logging screen and click on **Start Work**.



CLOSE A CALL

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

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

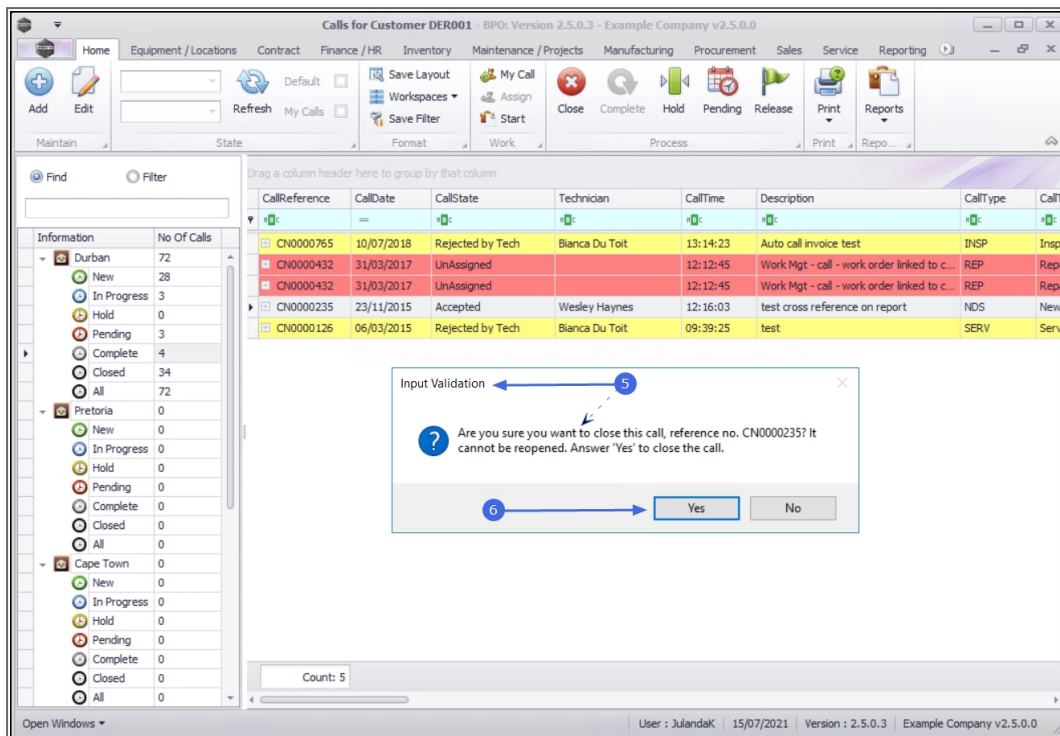


CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0000765	10/07/2018	Rejected by Tech	Bianca Du Toit	13:14:23	Auto call invoice test	INSP	Inspection
CN0000432	31/03/2017	UnAssigned		12:12:45	Work Mgt - call - work order linked to c...	REP	Repair
CN0000432	31/03/2017	UnAssigned		12:12:45	Work Mgt - call - work order linked to c...	REP	Repair
CN0000235	23/11/2015	Accepted	Wesley Haynes	12:16:03	test cross reference on report	NDS	New Deal Sale
CN0000126	06/03/2015	Rejected by Tech	Bianca Du Toit	09:39:25	test	SERV	Service

5. When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to close this call, reference no. [call ref number]? It cannot be reopened. Answer 'Yes' to close the call.**
6. Click on **Yes**.



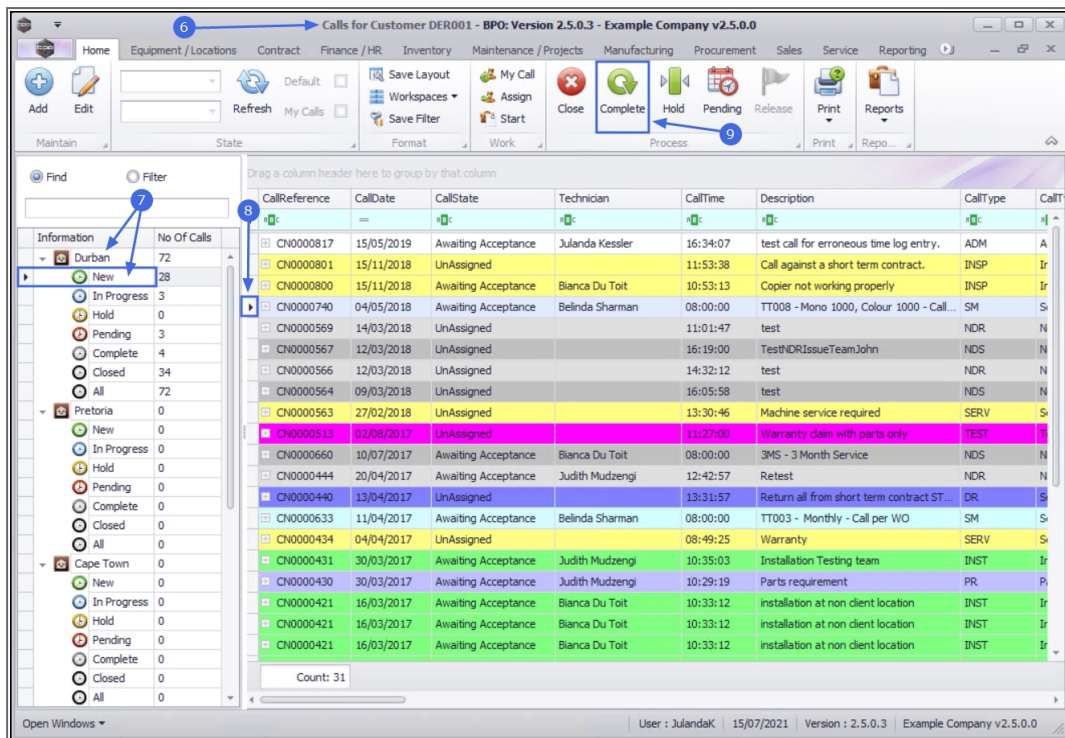
For a detailed handling of this topic refer to Calls - Close a Call



COMPLETE A CALL

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

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



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

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

The screenshot displays the 'Calls for Customer DER001' window. On the left, a sidebar shows a filter tree with categories like 'Durban', 'Pretoria', and 'Cape Town', each with a 'No Of Calls' count. The main area is a table of call records. An 'Input Validation' dialog box is open, asking: 'Are you sure you want to complete this call, reference no. CN0000740? Answer 'Yes' to complete the call.' The dialog has 'Yes' and 'No' buttons. Numbered callouts (5 and 6) point to the dialog and the 'Yes' button respectively.

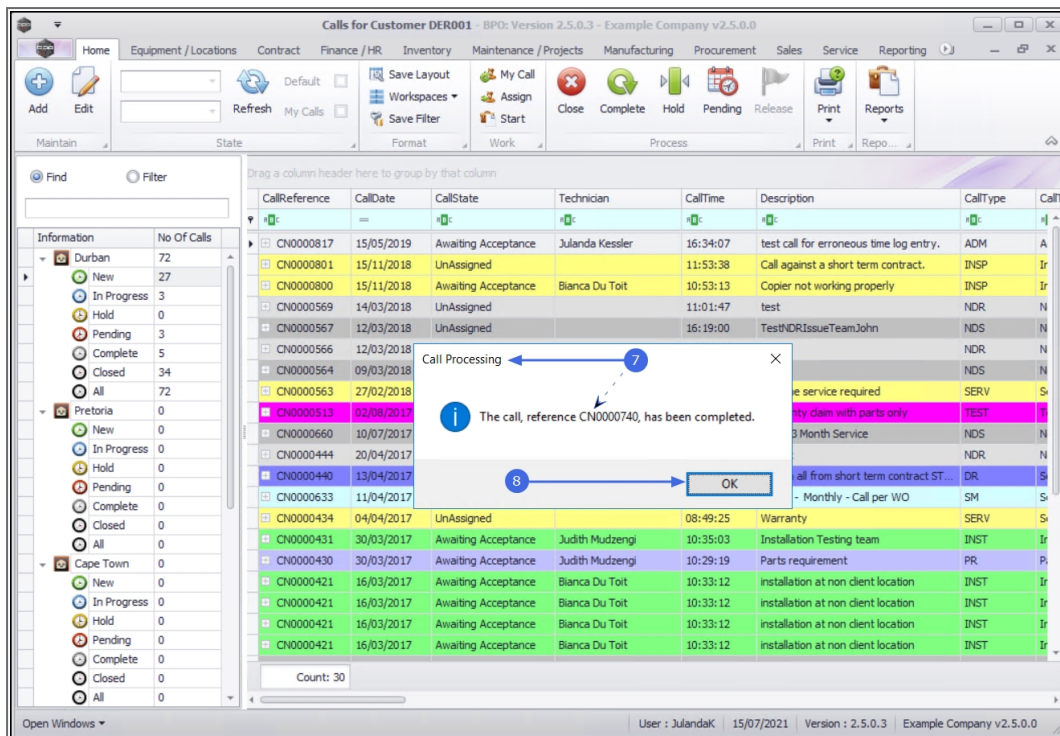
CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallT
CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry..	ADM	A
CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Ir
CN0000800	15/11/2018	Awaiting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

Count: 31

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



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

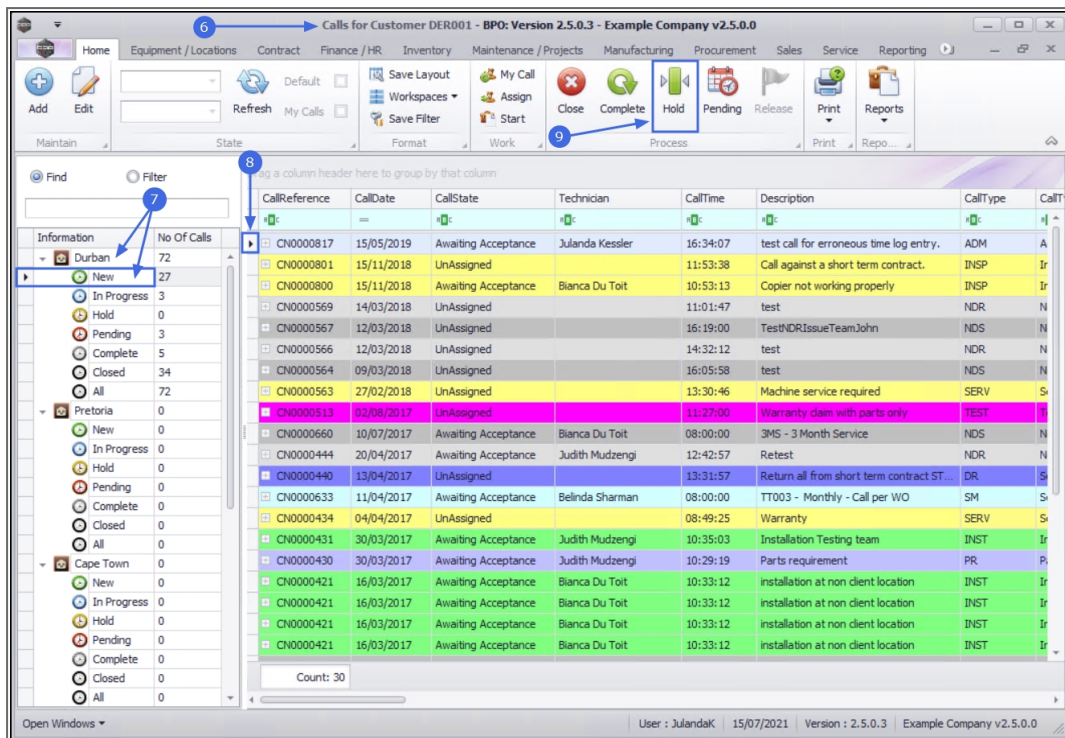


CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallT
CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	A
CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Ir
CN0000800	15/11/2018	Awaiting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

PLACE CALL ON HOLD

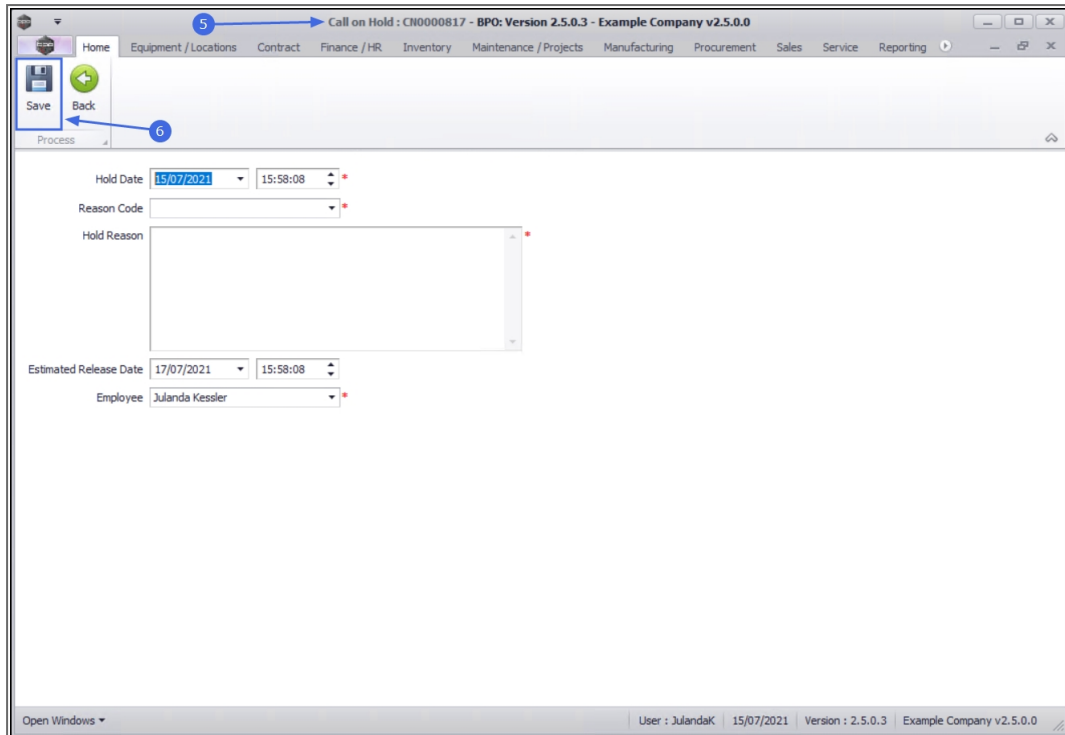
Placing a call on **Hold** will result in work being stopped to resolve a client/customer issue e.g there is no one available on site to allow a technician access to a location, or the client is awaiting approval from their finance department before a new part request can be fitted. The **SLA Monitor**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

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



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

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



MOVE TO PENDING

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

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

1. Click on 'Pending' button

2. Click on 'Filter' button

3. Click on 'Pending' in the filter tree

4. Click on 'CallReference' column header to group by that column

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CH0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CH0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Re
CH0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sa
CH0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Re
CH0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sa
CH0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
CH0000513	02/08/2017	UnAssigned		11:27:00	Warranty claim with parts only	TEST	Testing
CH0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sa
CH0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Re
CH0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call T
CH0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled M
CH0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
CH0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
CH0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requir
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000357	23/06/2016	Awaiting Acceptance	Bianca Du Toit	10:20:00	test	NDS	New Deal Sa

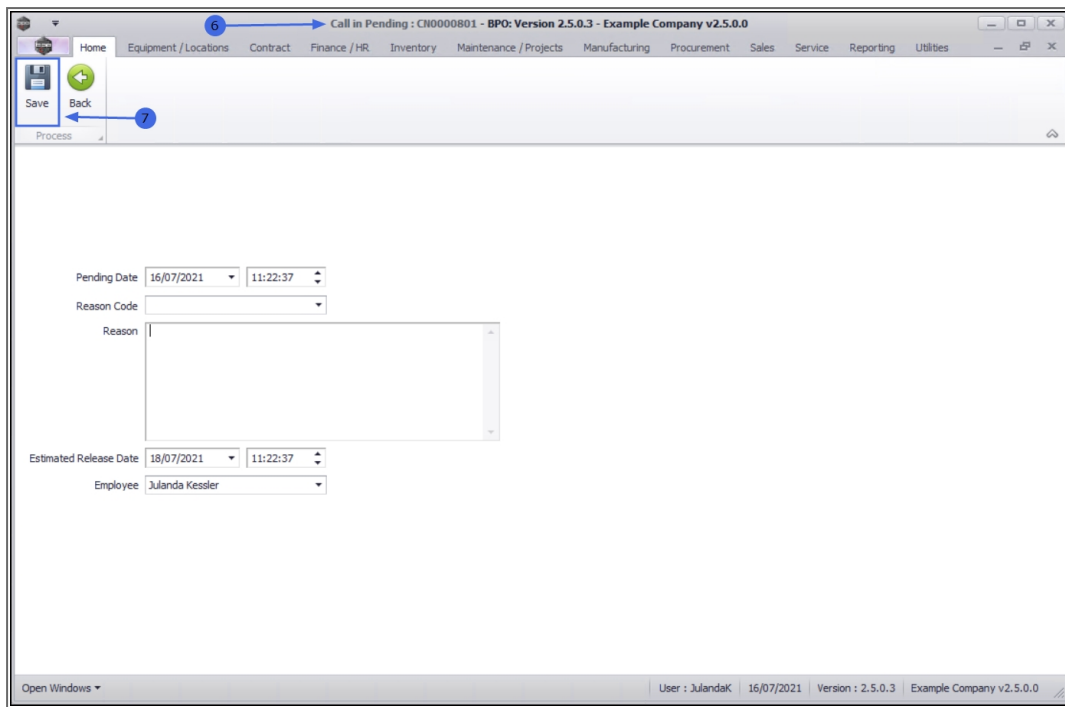
Count: 29

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

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



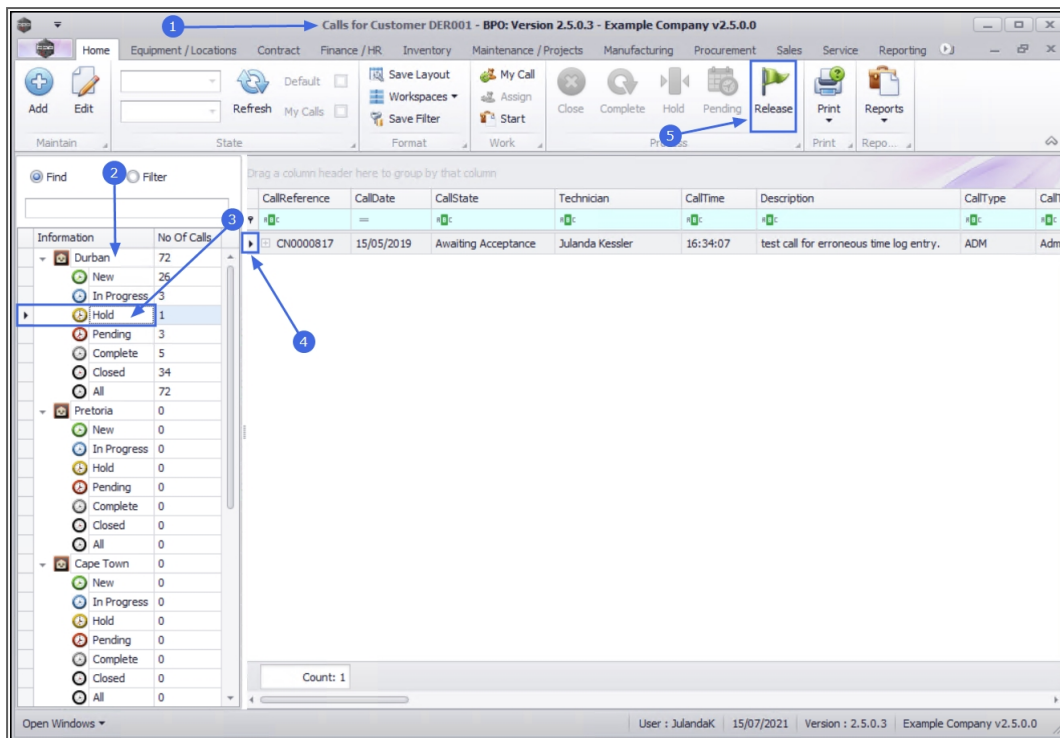
For a detailed handling of this topic refer to **Calls - Move to Pending Status**



RELEASE A CALL

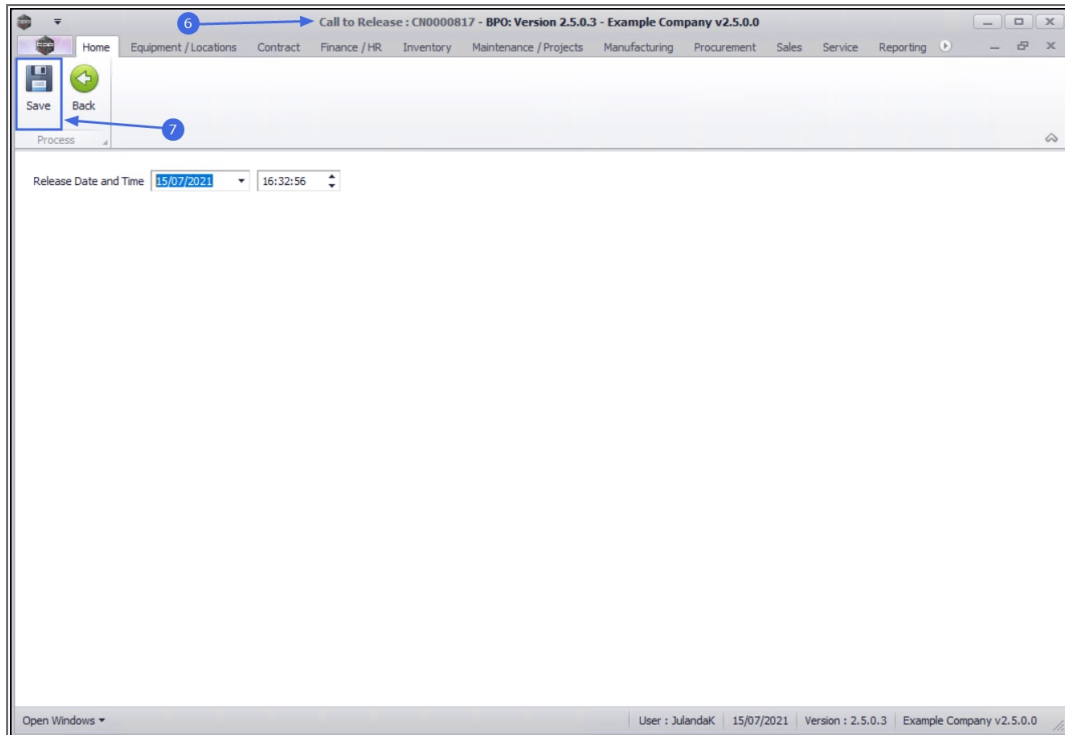
When a call is released, it will move back to the **New** status where it can be re-assigned. When the call is re-assigned, a new work order should be created.

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



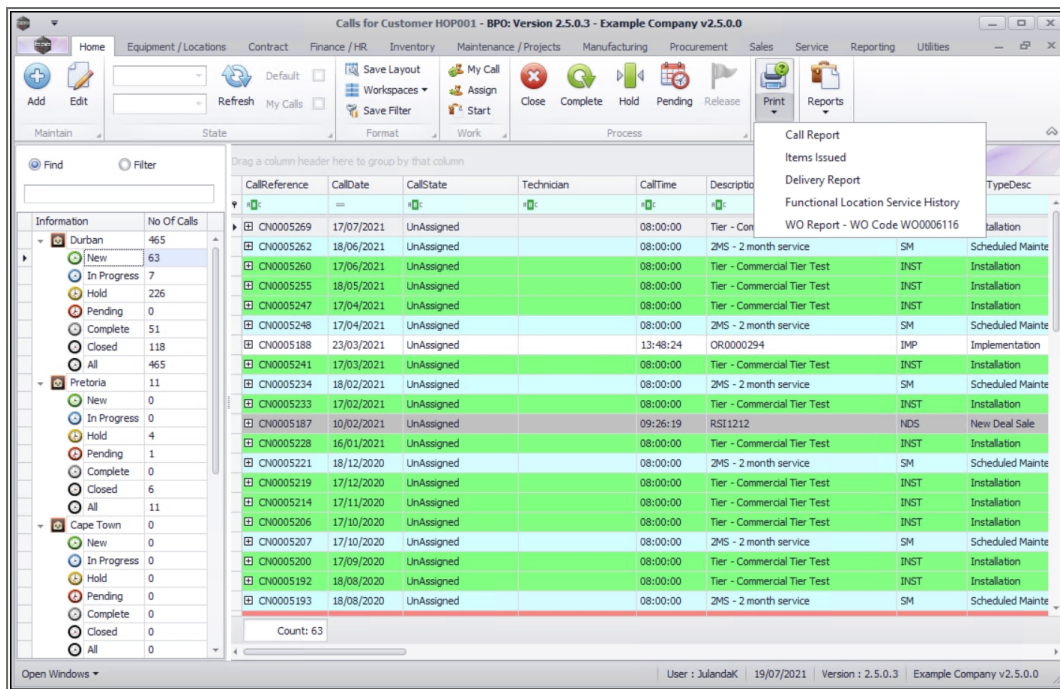
6. The **Call to Release** : [call ref number] screen will be displayed.
7. Complete the release information for the call and click on **Save**.

For a detailed handling of this topic refer to [Calls - Release a Call](#)



PRINT PANEL

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



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

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

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

Find Filter

Information No Of Calls

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

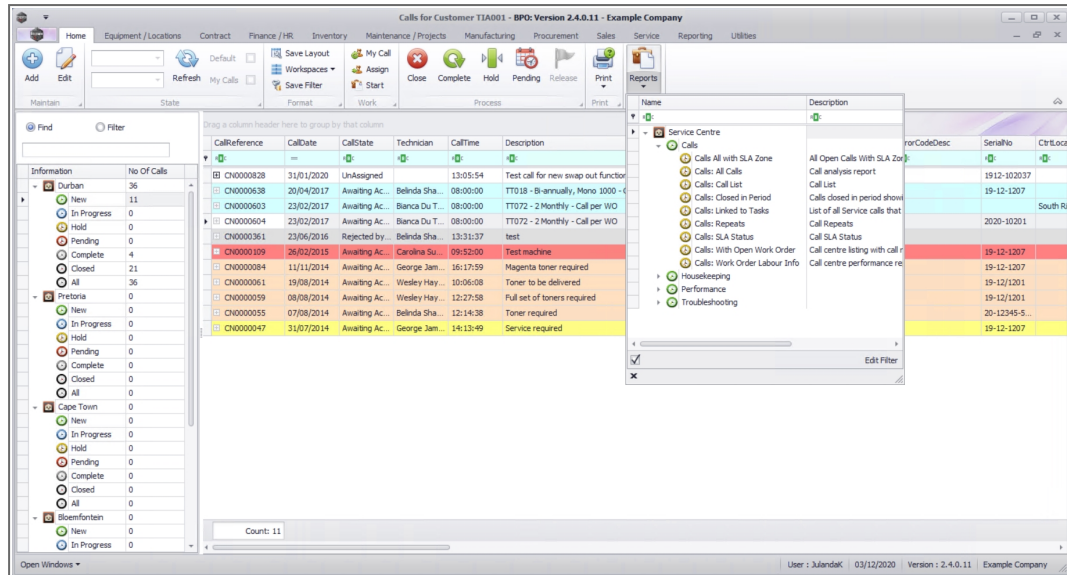
Count: 63

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

REPORTS PANEL

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

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



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

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

Count: 11

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

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