

SALES

CUSTOMERS - CALL HISTORY

The **Call History** tile can be found in both the <u>Customer Listing</u> and the <u>Customer Maintain</u> screen. This tile will direct you to a data grid of history regarding Calls linked to a <u>specific</u> 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*.
- Click in the *row* of the customer for whom you wish to view the *Call History* for.
- 5. Click on the *Call History* tile.



Home Equipm	ient / Lo	ocations	Contract Fi	inance / HR Inventory	Maintenan	ce / Projects	Manufacturin	ng Procurement	Sales Service	Reporting Utilities	- 6
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d Edit Delete Sy	nc	View	Save Layout Wor	rkspaces Hold Rele	ase Approve Account	Decline Account	Active	- Refresh Expo	ort Reports Print Stateme	ent	
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otes	но	P001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321
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	OFF	F001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
ontacts	YES	5001	co	Young Electric			Durban	100,000.00		082555555	2314687641
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ddresses	BOT	T0001	П	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
	SAN	4001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
	DAI	N001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
ocuments	PAN	V001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
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	LIT	0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
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roject History	FIN	0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
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6. The *Calls for Customer [customer code]* screen will display.

CALLS DATA GRID

- 7. By default, all *New* calls linked for the selected customer will display.
- 8. 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.



¢ •	Home Equipn	6-	Contract Finance	Calls fo	or Customer T.	IA001 - BPO: N	Version 2.4.0. Manufact	11 - Example Compar auring Procurement	Y Sales Ser	vice Repo	rting Utilities	_ D X _ B X
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Informa	tion	No Of Calls	▶ E CN0000828	31/01/2020	UnAssigned		13:05:54	Test call for new swap	out functionality	ADM	Administration	
P - 🖸	Durban	36	CN0000638	20/04/2017	Awaiting Ac	Belinda Sha	08:00:00	TT018 - Bi-annually, Me	ono 1000 - Call	SM	Scheduled Maintenance	
L 9	New	11	E CN0000603	23/02/2017	Awaiting Ac	Bianca Du T	08:00:00	TT072 - 2 Monthly - Ca	ll per WO	SM	Scheduled Maintenance	
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H 7	Pending	0	CN0000361	23/06/2016	Rejected by	Belinda Sha	13:31:37	test		NDR	New Deal Rental	
	Complete	4	CN0000109	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine		REP	Repair	
	Closed	21	CN0000084	11/11/2014	Awaiting Ac	George Jam	16:17:59	Magenta toner require	d	TON	Toner Required	
	All	36	CN0000061	19/08/2014	Awaiting Ac	Wesley Hay	10:06:08	Toner to be delivered		TON	Toner Required	
) b 🔿	Pretoria	0	CN0000059	08/08/2014	Awaiting Ac	Wesley Hay	12:27:58	Full set of toners requi	red	TON	Toner Required	
- F 🖸	Cape Town	0	CN0000055	07/08/2014	Awaiting Ac	Belinda Sha	12:14:38	Toner required		TON	Toner Required	
- • 🖸	Bloemfontein	0	CN0000047	31/07/2014	Awaiting Ac	George Jam	14:13:49	Service required		SERV	Service	
				8								
			Count: 1	11								
Open Wind	ows •								User : Jular	ndaK 03/12/	2020 Version : 2.4.0.11	Example Company

INFORMATION PANEL

- 9. The *Information* panel lists the <u>number</u> of calls for each <u>Call Status</u>.
- 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 <u>all</u> the Closed calls for the customer are displayed in the *Calls for Customer* data grid.



State		Format					ris i					
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1	CN0000366	07/09/2016	Rejected by	Bianca Du T	10:56:03	Work flow notification email test	TEST	Testing	CON	Contract Service		N
	E CN0000320	07/06/2016	No Signature	Bianca Du T	08:03:44	Machine needs a service	SERV	Service			19-12-1207	Г
	CN0000319	06/06/2016	Ended Work	Bianca Du T	17:00:32	Check machine to see if requested acc	INST	Installation			2020-10201	
	CN0000318	06/06/2016	Ended Work	Bianca Du T	16:42:03	Large streaks across pages on print	REP	Repair			2020-10201	
1	CN0000316	06/06/2016	Ended Work	Bianca Du T	16:33:00	Machine not switching on	REP	Repair			19-12-1207	
	CN0000301	01/04/2016	Rejected by	Bianca Du T	09:14:01	test	SERV	Service	EC	Error Code	1912-102037	С
	CN0000298	29/03/2016	No Signature	Bianca Du T	16:08:22	Test auto apply task	INST	Installation			2020-10201	
	CN0000225	18/11/2015	No Signature	Wesley Hay	14:45:59	Test partial returns	SERV	Service			19-12-1207	
	CN0000222	18/11/2015	Ended Work	Bianca Du T	11:36:55	Test partial non stock procurement pro	WC	Warranty Claim			19-12-1207	
	CN0000123	27/02/2015	UnAssigned		10:54:00	Machine service due	SERV	Service			19-12-1207	ſ
	CN0000115	26/02/2015	UnAssigned		11:11:46	Check toner levels	TON	Toner Required			19-12/1201	
	CN0000082	06/11/2014	Rejected by	Bianca Du T	13:11:57	3MS - 3 Month Service	SM	Scheduled Maintenance			20-12345-5	
	E CN0000079	06/11/2014	Rejected by	Bianca Du T	13:10:28	3MS - 3 Month Service	SM	Scheduled Maintenance				
	CN0000071	23/09/2014	Accepted	Steven Coo	13:49:09	Toner for delivery and machine service	SERV	Service			19-12-1207	
	CN0000065	21/08/2014	Accepted	Belinda Sha	09:00:09	test	REP	Repair				N
	CN0000037	21/07/2014	Ended Work	Bianca Du T	11:48:24	Machine service required	SERV	Service	FA	Faulty	20-12345-5	Г
	CN0000032	26/06/2014	UnAssigned		12:03:50	Delivery	SERV	Service			19-12-1207	
	CN0000029	19/06/2014	Accepted	Belinda Sha	12:53:31	Paper jam	SERV	Service			19-12-1207	
	CN0000028	13/06/2014	Accepted	Belinda Sha	14:43:23	New Installation	NDS	New Deal Sale				
	CN0000027	16/05/2014	UnAssigned		08:35:44	COR 4125 - Machine installation	NDS	New Deal Sale				
		Conception C	Checkerse 27/9/2014 C (20000330) 07/6/6/2016 C (20000330) 06/6/6/2016 C (20000318) 06/6/6/2016 C (20000318) 06/6/6/2016 C (20000318) 06/6/6/2016 C (20000318) 06/6/6/2016 C (2000028) 29/9/2018 C (2000022) 18/11/2015 C (2000022) 18/11/2015 C (20000115) 26/0/2015 C (2000012) 29/9/2016 C (2000012) 29/0/2014 C (2000002) 28/11/2014 C (2000007) 22/0/2014 C (2000007) 22/0/2014 C (2000007) 22/0/2014 C (2000002) 39/0/2014 C (2000002) 39/0/2014 C (2000002) 39/0/2014 C (200002) 30/0/2014	Discosci / 27/9/2018 Reserved Fit C (2000032) 07/6/2018 Fitsdard Work C (2000032) 06/6/2018 Ended Work C (2000032) 20/6/2018 Ended Work C (2000022) 18/11/2015 Ne Symbace C (2000022) 26/6/2015 Undesigned C (2000022) 26/6/2015 Undesigned C (20000022) 06/11/2014 Rejected by C (20000021) 2/6/6/2014 Accepted C (20000022) 2/6/6/2014 Accepted C (20000022) 2/6/6/2014 Massgned C (20000022) 1/6/6/2014 Accepted C (20000022) 1/6/6/2014 Accepted C (20000022) 1/6/6/2014 Accepted	Discosci Program Spracholis Research ITM Search DT C (20000320 076/6/2016 Folded Work Search DT C (20000320 076/6/2016 Folded Work Search DT C (20000330 06/6/2016 Ended Work Search DT C (20000330 0/6/2016 Folded Work Search DT C (20000320 0/2/0/2016 Rejected by. Search DT C (20000220 18/11/2015 Nold Synature Weiley Hay. C (20000123 2/6/2/2015 Undesigned Search DT C (20000123 06/11/2014 Rejected by Search DT C (20000027 2/6/6/2014 Accepted Search DT C (20000027 2/6/6/2014 Accepted Benck DT C (20000027 2/6/6/2014 Accepted Benck DT C (20000029 2/6/6/2014	Discoscie Sympletic Rescarch IV Served Dist Impletic C (20000320 076/6/2016 Fielded Winck Served Dist 1200322 C (20000320 076/6/2016 Fielded Winck Served Dist 1200322 C (20000330 06/6/2016 Fielded Winck Served Dist 1263202 C (20000330 06/6/2016 Fielded Winck Served Dist 1263203 C (20000330 06/6/2016 Fielded Winck Served Dist 1264203 C (20000330 06/6/2016 Fielded Winck Served Dist 1264203 C (20000330 0/10/2016 Rejected Pielded Biencia Dist 1056602 C (20000220 18/11/2015 No Signature 1123625 C (20000123 2/6/2/2015 Undersyned 1121626 C (20000123 2/6/2/2015 Undersyned 1121157 C (20000027 2/6/2/2014 Anopted Server Cosc 1236420 C (20000027 2/6/2/2014 Anopted Server Cosc 1246420 C (20000027 2/6/6/2014 U	Discossion Bigstraction Bission Discossion Discossion CH0000012 09/04/2016 Existed Winkt Bission Du T. 0.81-00 Discossion Discossion CH00000123 08/06/2016 Existed Winkt Bission Du T. 1.20-022 Discossions page inpret CH00000123 08/06/2016 Existed Winkt Bission Du T. 1.20-022 Discossing page inpret CH00000123 08/06/2016 Existed Winkt Bission Du T. 1.20-022 Discossing page inpret CH00000124 08/06/2016 Existed Winkt Bission Du T. 1.50-023 Discossing page inpret CH00000024 08/14/2016 Repetted by. Bission Du T. 0.51-101 test CH00000228 19/11/2016 Repetted by. Bission Du T. 1.51-57 Test park inform top oncurrent pro CH0000012 29/02/2015 Un-bissigned 111-156 Check thore levels CH0000012 29/02/2015 Un-bissigned 111-157 36-3 3 winh Service CH0000027 10/11/2014 Repetted Syn. Bissina Du T.	Discossion Sympositic Rescription Banca Du T. Biblio Structure Machine media service 1871 C (20000012) 096/02/16 Exided Wark Banca Du T. 1250/21 Order machine to service 1861 C (20000012) 096/02/16 Exided Wark Banca Du T. 1250/21 Order machine to service 1861 C (20000012) 096/02/16 Exided Wark Banca Du T. 1269/22 Dirac machine to service service service and service 1861 C (20000012) 096/02/16 Exided Wark Banca Du T. 063/30 Machine not save frage service and service 1867 C (20000012) 00/4/2016 Rejected by. Banca Du T. 063/30 Machine not save frage service 1867 C (20000022) 19/11/2015 Ne Synature Machine Du T. 111:16 Test paniaf not soft procumentarias 987 C (20000022) 19/11/2014 Rejected by. Banca Du T. 111:16 Ochorth Service 944 C (20000027) 00/11/2014 Rejected by. Banca Du T. 11:11:16 Ochorth Service 944<	0 0000004 00000054 00000054 00000056 00000056 00000056 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 00000057 000000057 000000057 0000000057 00000000000000 000000000000000000000000000000000000	Discossion Bysion Procession Bitted No. Discossion Discossion <thdiscossion< th=""> <thdiscossion< th=""> Di</thdiscossion<></thdiscossion<>	0 0000004 00000054 00000054 00000054 00000054 00000055 000000055 00000055 00	D0000000 Bigsyg200 Bigsyg200 <thbigsyg200< th=""> <thbigsyg200< th=""> <thbi< th=""></thbi<></thbigsyg200<></thbigsyg200<>

FIND OPTION

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

- 1. Make sure that the 'Find' radio button is selected.
- In the text box, type in the <u>full</u> *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 <u>New</u>.



4 •	Calls for Custor	mer TIA001 - BPO: Vers	ion 2.4.0.11 -	Example Company			_	
Home Equipment / Locations Contract F	inance / HR Inventory Maintenan	ce / Projects Manufac	turing Proc	surement Sales Service Repo	rting Utiliti	es	-	8 X
Add Edit Maintan Maint	Save Layout & My Call Workspaces • Save Filter Start	Close Complete Hol	d Pending	Release Print Reports				~
	er here to group by thist column							
Find Filter Calleafarance	California California	Technician	CallTime	Description	Callfuna	CallTuraDaas	ErrorCodo	ErrorCodeD
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- 🖸 Durban 36	20/04/2017 Awaiting Acceptance	Belinda Sharman	08:00:00	TT018 - Bi-annually, Mono 1000 - Call	SM	Scheduled Maintenance		
	aiting Acceptance	Bianca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
Information No	Of Calls vaiting Acceptance	Bianca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
Durban 26	jected by Tech	Belinda Sharman	13:31:37	test	NDR	New Deal Rental		
Uurban 30	vaiting Acceptance	Carolina Suzzetta Lour	09:52:00	Test machine	REP	Repair		
O New 11	vaiting Acceptance	George James Reddy	16:17:59	Magenta toner required	TON	Toner Required		
	aiting Acceptance	Wesley Haynes	10:06:08	Toner to be delivered	TON	Toner Required		
	08/08/2014 Awaiting Acceptance	Wesley Haynes	12:27:58	Full set of toners required	TON	Toner Required		
O New 0 ⊡ CN0000055	07/08/2014 Awaiting Acceptance	Belinda Sharman	12:14:38	Toner required	TON	Toner Required		
Hold 0	31/07/2014 Awaiting Acceptance	George James Reddy	14:13:49	Service required	SERV	Service		
Pending 0								
Complete 0								
O Closed 0								
V Cape Town 0								
In Program 0								
A Hold 0								
Pending 0								
Complete 0								
Closed 0								
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View 0 + 4								+

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

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



4 •						Calls for Custo	mer TIA001 - BPO: Ver	sion 2.4.0.11	Example Company			_	
Home E	Equipment / Loca	tions	(Contract Fir	nance / HR	Inventory Maintenan	ce / Projects Manufa	turing Pro	curement Sales Service Repi	orting Utilit	ies	-	e x
Add Edit	¥ S	Refi	3 fresh	Default	Save La Worksp Save Fi	ayout & My Call aces • & Assign Iter 1 Start Work	Close Complete Ho	ld Pending	Release Print Reports				\$
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	1.000		Ca	alReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
CN0000222			۲ × E	c /	-	·D:	100	4 0 0	10:	10c	R O C	·D:	10:
Information	No Of Calls			CN0000367	07/09/2016	Rejected by Tech	Bianca Du Toit	13:23:40	Work flow test	REP	Repair	EC	Error Code
👻 💽 Durban	36	÷ -		CN0000366	07/09/2016	Rejected by Tech	Bianca Du Toit	10:56:03	Work flow notification email test	TEST	Testing	CON	Contract Se
O New	11			CN0000320	07/06/2016	No Signature	Bianca Du Toit	08:03:44	Machine needs a service	SERV	Service		
 In Progres 	s 0			CN0000319	06/06/2016	Ended Work	Bianca Du Toit	17:00:32	Check machine to see if requested acc	INST	Installation		
O Rending	0			CN0000318	06/06/2016	Ended Work	Bianca Du Toit	16:42:03	Large streaks across pages on print	REP	Repair		
Complete	4			CN0000316	06/06/2016	Ended Work	Bianca Du Toit	16:33:00	Machine not switching on	REP	Repair		
Closed	21		E	CN0000301	01/04/2016	Rejected by Tech	Bianca Du Toit	09:14:01	test	SERV	Service	EC	Error Code
Q AI	36		10	CN0000298	29/03/2016	No Signature	Bianca Du Toit	16:08:22	Test auto apply task	INST	Installation		
+ 🖸 Pretoria	0		Ý	CN0000225	18/11/2015	No Signature	Wesley Haynes	14:45:59	Test partial returns	SERV	Service		
New	0	Б		CN0000222	18/11/2015	Ended Work	Bianca Du Toit	11:36:55	Test partial non stock procurement pro	WC	Warranty Claim		
 In Progres 	s d			CN0000123	27/02/2015	UnAssigned		10:54:00	Machine service due	SERV	Service		
(2) Hold	0			CN0000115	26/02/2015	UnAssigned		11:11:46	Check toner levels	TON	Toner Required		
O Pending	0			CN0000082	05/11/2014	Rejected by Tech	Bianca Du Toit	13:11:57	3MS - 3 Month Service	SM	Scheduled Maintenance		
Complete	0			CN0000079	05/11/2014	Rejected by Tech	Bianca Du Toit	13:10:28	3MS - 3 Month Service	SM	Scheduled Maintenance		
Q Al	0			CN0000071	23/09/2014	Accepted	Steven Cooper	13:49:09	Toner for delivery and machine service	SERV	Service		
- 🕅 Cape Town	0	0 -		CN0000065	21/08/2014	Accepted	Belinda Sharman	09:00:09	test	REP	Repair		
O New	0		÷	CN0000037	21/07/2014	Ended Work	Bianca Du Toit	11:48:24	Machine service required	SERV	Service	FA	Faulty
In Progress	s 0			CN0000032	26/06/2014	UnAssigned		12:03:50	Delivery	SERV	Service		
🚯 Hold	0			CN0000029	19/06/2014	Accepted	Belinda Sharman	12:53:31	Paper jam	SERV	Service		
Pending	0			CN0000028	13/06/2014	Accepted	Belinda Sharman	14:43:23	New Installation	NDS	New Deal Sale		
Complete	0		•	CN0000027	16/05/2014	UnAssigned		08:35:44	COR 4125 - Machine installation	NDS	New Deal Sale		
O Closed	0												
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 New 	V		• =										•

FILTER OPTION

The *Filter* option allows you to specify a <u>range</u> of Calls by typing the prefix or <u>part</u> 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*.



\$ •					Calls for Custor	ner TIA001 - BPO: Vers	ion 2.4.0.11 -	Example Company			_	
Home	Equipment / Loca	itions	Contract Fir	nance / HR I	Inventory Maintenan	ce / Projects Manufac	turing Proc	urement Sales Service Repo	rting Utiliti	es	-	₽ ×
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		- 11	CalReference	CallDate	CallState	Technician	CallTime	Description	CalType	CallTypeDesc	ErrorCode	ErrorCodeD
CN00006		٩	-O:	-	allo	R C	R C	A C	·D:	a 🖸 c	· 🛛 :	4 0 0
Information	No Of Calls		E CN0000828	31/01/2020	UnAssigned		13:05:54	Test call for new swap out functionality	ADM	Administration		
👻 🔯 Durban	36	*	CN0000638	20/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT018 - Bi-annually, Mono 1000 - Call	SM	Scheduled Maintenance		
New	11		CN0000603	23/02/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
In Progr	ess 0		CN0000604	23/02/2017	Awaiting Acceptance	Bianca Du Toit	08-00-00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
() Hold	0		CN0000361	23/06/2016	Rejected by Tech	Belinda Sharman	13:31:37	test	NDR	New Deal Reptal		
Pending	0		CN0000109	26/02/2015	Awaiting Accentance	Carolina Suzzatta Lour	00:52:00	Test machine	DED	Pagair		
Complet	2 4		CN0000084	11/11/2014	Awaiting Acceptance	Caorda James Reddy	16:17:50	Maganta toper required	TON	Topar Required		
Closed O Al	21		CN0000061	10/09/2014	Awaiting Acceptance	Warlay Hawner	10:06:09	Toper to be delivered	TON	Toner Required		
- Retoria	0		CN0000081	19/08/2014	Awaiting Acceptance	Wesley Haynes	10:00:00	Full and of tensors and include	TON	Toner Required		
New	0			08/08/2014	Awaiting Acceptance	wesley Haynes	12:27:58	Full set of toners required	TON	Toner Required		
O In Progr	0 224		CN0000055	07/08/2014	Awaiting Acceptance	Belinda Sharman	12:14:38	Ioner required	TON	Toner Required		
(A) Hold	0		E CN0000047	31/07/2014	Awaiting Acceptance	George James Reddy	14:13:49	Service required	SERV	Service		
A Pending	0											
O Complet	e 0											
O Closed	0											
O AI	0											
👻 🔯 Cape Town	0											
New	0											
🕗 In Progr	ess 0											
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Complete	2 0											
Closed	0											
O AI	0											_
- 🖸 Bloemfontei	1 0		Count: 11									
New	0	T 4	c)							+

3. The example has the Reference **CN00006** entered, which will search for and display <u>all</u> 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.



â v					Calls for Cu	stomer TIA0	01 - BPO: Version 2.4.0.11 - Example (Company					
Home Faulor	nent / Locations	Contract Enance	a /HD Inventr	orv Mainte	nance / Projects	Manufac	turing Progurement Sales Ser	vice Per	orting Utilities				a x
Add Edit	refres State	Default sh My Calls	Save Layout Workspaces • Save Filter Format	My Cal Assign Start Work	Close C	C Proce	d Pending Release Print Repo	srts	ang outo				6
0-1 0-1	-						Applied Filter : [CallReferen	nce] Like 'CN	00006%'				
O Find O Filter	3												
CIN00006	\rightarrow	CalReference	▼ CalDate	CallState	Technician	CalTime	Description	CalType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	CtrtLo
Information	No Of Calls	9 1%C CN00006%	-	10:	(0)	10:	(D):	10:	(D):	100	(D):	10:	(D)
🕨 👻 🔯 Durban	36	CN0000628	20/04/2017	Austrilian Ac	Palada Cha	08-00-00	TT019 - Bi approally, Mana 1000 - Call	CM.	Exhands and Maintenances	-	-	10.12.1207	-
New	11	CN0000038	20/04/2017	Awalung Ac	Dellina aria	00.00.00	TTOTO - Brainbally, Hono 1000 - Call	014	Scheduled Maintenance			15-12-1207	0
 In Progress 	0	CN0000603	23/02/2017	Awaiting Ac	Bianca Du T	08:00:00	11072 - 2 Monthly - Call per WO	5191	Scheduled Maintenance				South
(b) Hold	0	E CN0000604	23/02/2017	Awaiting Ac	Bianca Du T	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance			2020-10201	
Pending	0												
O Complete	4												
O Closed	21		1										
O AI	36		1										
Pretoria	0												
Cape Town	0		1.1										
Bloemfontein	0		1										
A New Test Site	0	1											
		Counts	3										
	4		Ý			-							
	۲.	🗙 🖌 [CalReferen:	ce] Like 'CN00006	%'									Edit Filte
Open Windows -									User :	JulandaK 03/12/2	20 Version : 2.4.0.1	L Example Com	pany

LOG A CALL

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

• •		6)-		Calls for C	ustomer DER001 - BP	0: Version 2.5.0.3 - Exa	nple Compan	y v2.5.0.0		_ — X
Home Ec	quipment / Loca	ations		Contract Fi	nance / HR	Inventory Maintenar	nce / Projects Manufac	turing Proc	curement Sales Service Repo	rting Utilitie	s _ в х
Add Edit	*	Ref	<u>R</u> fres	Default 🔲 h My Calls 🗌	🔯 Save Li 🔛 Worksp 🍟 Save Fi	ayout 🥵 My Call baces 🔻 🍇 Assign ilter 🍄 Start	Close Complete Ho	d 👸 Id Pending	Release Print Reports		
Maintain 🖌 🦉	-	State	_		⊿ Forma	t 🔺 Work 🖌	Proce	SS	A Print A Repo A		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
◎ Find ○ F	ilter										
1		- II	(CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
			9	.	-	N C	n 🗖 c	n 🗖 c	a 🗖 c	n 🗖 c	n 🖬 c
Information	No Of Calls		•	CN0000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration
🕨 👻 🔯 Durban	72	-		CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
New	28	- 11		CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
In Progress	3	111		CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call	SM	Scheduled Maintenan
Hold	0	- 11		CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
Complete	4	- 11 1	1	CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
Closed	34	111		CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
Ø All	72		1	CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
🗸 🔯 Pretoria	0			CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
New	0	Í	T.	CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty daim with parts only	TEST	Testing
In Progress	0			CN0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
(b) Hold	0			CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
Pending	0			CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST	DR	Select Call Type
O Complete	0	0		CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call ner WO	SM	Scheduled Maintenan
Closed	0			CN0000434	04/04/2017	InAssigned		08:49:25	Warranty	SERV	Service
Gana Tawa	0			CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
Cape Town	0			CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requirement
In Progress	0			CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
(b) Hold	0			CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10-33-12	installation at non client location	INST	Installation
Pending	0			CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10-33-12	installation at non client location	INST	Installation
O Complete	0			010000421	10/03/2017	Anothing Acceptance	Dance De Tolt	10.00.12	installation at non-client location	and the	In Build out
Closed	0			Count: 31							
	0	Ŧ	4 0			-					+
Open Windows 🕶								Use	er : JulandaK 14/07/2021 Version : 2	.5.0.3 Examp	le 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*.

۵.	,				3-			all maintena	ance - BPO: Ve	ersion 2.5.0.3	- Example	Compar	ny v2.5.0.0							x
	Home	Equ	ipment / Loc	ations	Contrac	t Fina	nce / HR	Inventory	/ Maintena	ince / Projects	Manufa	cturing	Procurement	Sales	Service	Reporting	Utilities	-	8	х
H	\bigcirc	8	Q	2	•	輵	P	-	2		2	•								
Save	Back	Close	Complete	Assign	Hold	Pending	Release	Reinstate	Save Layout	Workspaces	Print	Note								
Main			-4		0						-	1.5								
Main	tan "a		_		Process			4	Por	Deletes Te :	a Print a	Into	4							~
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Enter te	ext to searc	:h	ρ	cust					-	 Serial No 	ype	Ke	ilerenceivo							ipme
Func	tions			Cor	ntact			م		Prior Call Re	eference									I I
				Contac	t No.					Call Reques	t Reference									ofin
Wo				Add	lress			م	*	Contract No)									0
										Location										usto
									· •	Ounte Refe	rence			_						mer
Wo	rk In Progr	ess		Call	Туре				•	Invoice Ref	erence			_						Info
				Emori	code				-	Order Refe	rence									-
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Not	tor			Descrip	ption				^ *											
																				User
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			G	all Date	Time 14	1/07/2021	•	11:30:23	÷											ined
Ass	signments			Pri	ority	3 🛟 *				- Prior Calls										
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Hol	d History		Da	ate Requ	uired 14	1/07/2021	•													
				Orde	er No															
				Loga	d By	landaK														
Per																				
				St	atus	- New														
				Option	al No															
On	Site Info	1																		
Matara			_							l										
Open W	/indows 🔻												User : Juland	aK 14/01	7/2021 Ve	ersion : 2.5.0.3	Example Co	ompany v2	.5.0.0	
														- 101				,,		11

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 with to edit.
- 4. Click on *Edit*.



		1)-		Calls for C	ustomer DER001 - BPC	D: Version 2.5.0.3 - Exa	ample Compan	y v2.5.0.0						
Home Eq	uipment / Locatio	ons	Contract Fi	nance / HR	Inventory Maintenar	nce / Projects Manufa	acturing Pro	curement Sales Service Repo	rting Utilitie	s _ & ×				
Add Edit	• • •	Refre	Default esh My Calls	Image: Save La Image: Workspace Image: Save File Image:	aces Assign ter Work	Close Complete H	lold Pending	Release Print Reports		~				
Find Fil	Find O Filter 3 og a column header here to group by that column Calificeference Califiate Califiate Description													
2			CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc				
		ł	* D :	-	10:	10c	10c	* D c	# C	10:				
Information	No Of Calls	Ī	E CN0000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration				
👻 🛐 Durban	72	-	CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection				
New	28	11-	CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection				
In Progress	3		CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call	SM	Scheduled Maintenan				
Hold	0	-	CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental				
Complete	3		CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale				
Closed	34	11-	CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental				
O All	72	11-	CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale				
→	0	1-	CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service				
New	0	-	CN0000513	02/08/2017	Unassigned		11:27:00	Warranty daim with parts only	TEST	Testing				
In Progress	0	-	CN0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08-00-00	SMS - 3 Month Service	NDS	New Deal Sale				
🕑 Hold	0	-	CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Detert	NDP	New Deal Pental				
Pending	0	11-	CN0000440	13/04/2017	UnAccioned	Judio Modeengi	13:31:57	Patro all from chort term contract ST	DP	Select Call Tune				
Complete	0	-	CN0000622	11/04/2017	Awaiting Acceptance	Relinda Sharman	08:00:00	TT002 - Monthly - Call per WO	CM	Sched and Maintenan				
O Closed	0		CN0000434	04/04/2017	Awarding Acceptance	Delinda Sharman	00.00.00	Warranty	CEDV	Scheduled Maintenan				
O All	0	-	CN0000431	20/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Tacting team	INCT	Installation				
- Cape Town	0	-	CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:33:03	Deste se prinement	100	Installauon				
In Progress	0		CN0000430	16/02/2017	Awaiting Acceptance	Risses Du Teit	10.22.12	installation at non-diget location	INCT	Failts Requirement				
() Hold	0	-	Ch0000421	16/02/2017	Awaiting Acceptance	Biance Du Teit	10:33:12	installation at non client location	THET	Installation				
O Pending	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Tolt	10:33:12	installation at non client location	THET	Installation				
O Complete	0		CN0000421	16/05/2017	Awarung Acceptance	bianca Du Toit	10:53:12	Installation at non client location	INST	Installation				
O Closed	0		Count: 31											
O All	0 .	- 4			-					,				
Open Windows 🕶							Use	er : JulandaK 14/07/2021 Version : 2.	5.0.3 Examp	le Company v2.5.0.0				

5. "Call Details" on page 4

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

¢ • 5	Call mainter	ance : Call re	ef CN00008	17 - BPO: Versi	on 2.5.0.3 -	Examp	ole Company	v2.5.0.0					x
Home Equipment / Locations Cr	ntract Finance / HR	Inventory	Maintena	ince / Projects	Manufactu	uning	Procurement	Sales	Service	Reporting	Utilities	- 6	P X
💾 😋 🔞 🚱 🞿 🕨	M 🛱 🏲	-	2J		9	۹							
Save Back Close Complete Assign H	old Pending Release	Reinstate	Save Layout	Workspaces	Print	Note							
Maintain 6 Pr	ress		For	mat	Print	Info							
Linke B				Relates To :									
Enter text to search Q Custome	Derton / Technologies	م	+ *	ReferenceTy	pe	Ref	ferenceNo						timb
Contac	Maggie Smart	م	•	Serial No		202	0-1111						alle.
Functions	0.21 122 4795			Prior Call Ref	erence								
Contact in	031 123 4765			Location		COL	0000074						0
Work Orders 1 Addres	685 Silver Oak Road Forest Hills	م	<u></u>	Project Refer	ence								0
	Upper Highway Area		-	Quote Refer	ence								CONIC
				Invoice Refe	rence	_							1
Work In Progress Call Typ	Administration		•	Order Refere	nce								G
Error Cod	•		•										0
Notes	test call for erroneous entry.	time log	*										la co
Call Date Tim	± 15/05/2019 ▼	16:34:07	\$										Politic
Assignments Priorit	3 1 *			Prior Calle 1									
				CalReference	e CallD	ate	CallTime	Descriptio	n				1
				CN0000817	15/0	5/2019	16:34:07	test call fi	or erroneous	time log entry.			1
Hold History Date Require	15/05/2019 -												
Order N	>												
Logged B	BiancaD												
Pending History State	N - New												
Optional N	>												
On Site Info 1				1									•
Meters													



STATE PANEL

In the State panel the following filters are <u>not</u> available in this view, because all the calls linked to the <u>specific customer</u> 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 <u>save</u> 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

1	9	*		Calls for 0	Customer TIA001 - BPO: Ver	sion 2.4.0.11 - Exampl	le Company			- 0 x
	4	Home	Equipment / Locations Contract I	Pinance / HR Inventory	Maintenance / Projects	Manufacturing Pro	ourement Sales	Service	Reporting Utilities	- 0 ×
	2	Edt	Refeat Hy Cals	I Save Layout I Workspaces ▼ I Save Filter	Anny Call S Composition Composition	ete Hald Pending	Notare Part	Reports		
II.	Mat	tain a	State	Format	Work a	Process	, Print ,	Repo		û



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.

			Contrast E	Calls to	r customer Dekool - r	PO: Version 2.5.0.5	- Example Col	mpany vz.5.0.0	Color Constant of		
Home Equ	ipment / Locatio	ns	Contract Pil	hance / Hik	Inventory Maintenar	nce / Projects Mai	iutacturing	Procurement	Sales Service F	keporting	Utilities — D
	+	23	Default 🗌	ing Save L	ayout		▶ 4 16		🚔 📲 🗎		
Edit	-	Refres	h My Calls	Works	paces 🗸 🎿 Assign	Close Complete	Hold Pendir	ng Release	Print Reports		
				Save F	ilter i Start				• •		
aintain 🔺	Sta	te		J Forma	t 🔺 Work 🔺	-	rocess	P	rint 🔺 Repo 🖌		
Find O Filt	er	3		r here to group	by that column						
			CallReference	CallDate	CallState	Technician	CallTime	Description		CallType	CallTypeDesc
<hr/>		•	* 0 ¢	-	10×	4 0 4	#Oc	* 0 ¢		*Dc	1 0 :
formation	No Of Calls	D	CN0000817	15/05/2019	UnAssigned		16:34:07	test call for err	oneous time log entry.	ADM	Administration
Durban	72 🔺	H	CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a s	hort term contract.	INSP	Inspection
New 🕑	28		CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not wor	ing properly	INSP	Inspection
In Progress	3		CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono	1000, Colour 1000 - Call.	SM	Scheduled Maintenance
() Hold	0	-	CN0000569	14/03/2018	LinAssigned		11:01:47	test		NDR	New Deal Rental
Pending	3	1-9	CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueT	eam John	NDS	New Deal Sale
Complete	9		CN0000566	12/03/2018	UnAssigned		14:37:17	tact	Component	NDD	New Deal Pental
Closed	72		CN0000564	00/03/2018	UnAssigned		16:05:59	test		NDS	New Deal Sale
Pretoria	0		CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service	required	SEDV	Service
New	0		CN0000513	02/08/2017	UnAccionad		11:27:00	Warranty daim	with parts only	TEST	Tarbon
In Progress	0		CN0000515	10/07/2017	Augiting Acceptance	Rispes Du Toit	08:00:00	2ME - 2 Month	Service	NDC	New Deal Cale
() Hold	0		CN00000444	20/04/2017	Awaiting Acceptance	Judith Mudannai	12:42:57	Detect	Jei vice	NDD	New Deal Deatal
Pending	0		CN0000440	12/04/2017	Awarding Acceptance	Judia mudzengi	12:21:57	Retest	chart term contract CT	DO	Felect Call Tupo
Complete	0			11/04/2017	Availies Assesses	Daliada Charman	13:31:37	TT002 Maste	short term conductor	CM.	Select Call Type
Closed	0		CN0000633	11/04/2017	Awalung Acceptance	beinga sharman	00:00:00	11003 - Month	iy - Call per WO	SIM	Scheduled Maintenance
	0		CN0000434	04/04/2017	UnAssigned	Toolith Mandamani	10:35:03	Warranty	Kan kana	DERV	Service
Cape Town	0		CN0000431	30/03/2017	Awaring Acceptance	Judith Mudzengi	10:35:03	Installation res	ung team	11/21	Installation
New New	0		E CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirem	ent	PR	Parts Requirement
Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at n	on client location	INST	Installation
Pending	0		CN0000421	16/03/2017	Awarting Acceptance	Bianca Du Toit	10:33:12	installation at n	on client location	INST	Installation
C Complete	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	instaliation at n	on client location	INST	Installation
O Closed	0		Count: 31								
() All	0 +	+ 0									

- 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.



; -				Calls for	Customer DER001 - B	PO: Version 2.5.0.3	- Example Con	npany v2.	5.0.0			
Home Eq	uipment / Locat	ions	Contract F	nance / HR	Inventory Maintenan	ice / Projects Mar	ufacturing P	rocurement	t Sales Service R	eporting (Jtilities — 🗗	1
Add Edit	+ * St	Refre	Default	Save La Worksp	aces Assign ter Work	Close Complete	Hold Pending	g Release	Print Reports			
© Find O Fi	iter	Dra	ag a column heade	er here to group	by that column							
0			CallReference	CallDate	CallState	Technician	CallTime	Descriptio	n	CallType	CallTypeDesc	
		ę		-	10c	10:	# 	10c		100	(D)	
Information	No Of Calls		CN0000817	15/05/2019	UnAssigned		16:34:07	test call fr	or erroneous time log entry.	ADM	Administration	
👻 💽 Durban	72	*	CN0000801	15/11/2018	UnAssigned		11:53:38	Call again	st a short term contract.	INSP	Inspection	
New	28	11-	CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier no	t working properly	INSP	Inspection	
In Progress	3	- 11	E CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - N	Iono 1000, Colour 1000 - Call	SM	Scheduled Maintenance	
() Hold	0	- 11	CN0000569	14/03/2018	UnAssigned		11:01:47	test		NDR	New Deal Rental	
Pending	3	11-1	CN0000567	12/03/2018	UnAssigned		16:19:00	TeethDDI	coueTeam John	NDS	New Deal Sale	
Complete	4		CN0000566	12/03/2016	UNASsigned	•	10,19,00	TESUIDRI	ssuereamponn	NDD	New Deal Bootal	
Closed	34		CN0000366	input validatio	on	-5				NDR	New Deal Cela	
Drotoria	0	- 11	CN0000564		Ľ				and a second second	NUS	New Deal Sale	
New	0		CN0000563	👩 Thi	s call, CN0000817, is in s	status - New. Do you	still want to tal	ke	ervice required	SERV	Service	
In Progress	0	1-	CN0000513	ow 🕑	nership?				claim with parts only	TEST	Testing	_
() Hold	0		CN0000660						onth Service	NDS	New Deal Sale	
Pending	0		CN0000444		-		_			NDR	New Deal Rental	
Complete	0		E CN0000440		6		No		from short term contract ST	DR.	Select Call Type	
O Closed	0		E CN0000633						fonthly - Call per WO	SM	Scheduled Maintenance	
() All	0		CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty		SERV	Service	
- 🖸 Cape Town	0		CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installatio	n Testing team	INST	Installation	
New	0		E CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requ	uirement	PR	Parts Requirement	
In Progress	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installatio	n at non client location	INST	Installation	
(b) Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installatio	n at non client location	INST	Installation	
Pending	0	-	E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installatio	n at non client location	INST	Installation	
Complete	0				and a second second second					-		
Closed	0		Count: 31									
	0	* 4	c									
ven Windows 🔻								Licer	JulandaK 14/07/2021 Ver	rsion : 2 5 0 3	Example Company v2 5.0	C

- 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.

₫ =				Calls fo	r Customer DER001 - E	PO: Version 2.5.0.3	- Example Con	ipany v2	.5.0.0		_ D X
Home Equ	uipment / Locations	s	Contract Fit	nance / HR	Inventory Maintenar	nce / Projects Mar	nufacturing P	rocuremen	nt Sales Service R	leporting	Utilities _ & X
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				=		(Dr		n Dr		alle	
Information	No Of Calls		- Chicococo 17	15/05/2010	1 Markenian and		10.24.07	the state of the	6	4044	Administration
👻 🔯 Durban	72 *		CN0000817	15/03/2019	UnAssigned		11,52,20	Call agai	not a chert form contract	TNCD	Auministration
New	28		CN0000001	15/11/2010	Awaiting Acceptance	Rippers Du Teit	10,52,12	Conier n	at working property	TNCD	Inspection
In Progress	3		CN0000340	04/05/2019	Awaiting Acceptance	Beliada Sharman	10:33:13	TTOOR	Mono 1000, Colour 1000 - Col	CM	Echeduled Maintenance
() Hold	0		CN0000740	14/02/2010	Awarung Acceptance	Deliriud Sindrinidri	11:01:47	tost	Mono 1000, Colour 1000 - Call	NDD	New Deal Deatal
Pending	3		C1400000303	17/03/2010	UnAssigned		11.01.47	Tratting	Tan in Tanan Jahn	NDR	New Deal Cela
Complete	4		CN0000567	12/03/2018	UnAssigned		10:13:00	TESUVUR	IssuereamJohn	NUS	New Deal Sale
Closed	34	-	CIV0000566	Call Process	ing			~		NDR	New Deal Rental
O All	72		CN0000564			1.			and the second second	NDS	New Deal Sale
Pretona	0		CN0000563		where the set of the s	oce CN0000817 bas	heen ruccerrful	e	service required	SERV	Service
In Progress	0	-	CN0000513		whership of call, refere	ice craoooon, nas	been succession		y claim with parts only	TEST	Testing
() Hold	0		CN0000660					81	Month Service	NDS	New Deal Sale
() Pending	0	-	CN0000444		•					NDR	New Deal Rental
O Complete	0	1	CN0000440		8-		- OK	a	Il from short term contract ST	DR	Select Call Type
O Closed	0		CN0000633						Monthly - Call per WO	SM	Scheduled Maintenance
O All	0		CN0000434	04/04/2017	UnAssigned		08:49:25	Warrant	у	SERV	Service
👻 💽 Cape Town	0	6	CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installati	on Testing team	INST	Installation
New	0	E	CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts red	quirement	PR	Parts Requirement
In Progress	0	1	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installati	on at non client location	INST	Installation
() Hold	0	5	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installati	on at non client location	INST	Installation
Pending	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installati	on at non client location	INST	Installation
Complete	0		c								
Closed	0		Count: 31								
U All	U +	4.0									+
Open Windows 🕶								User	: JulandaK 14/07/2021 Ve	rsion : 2.5.0.	3 Example Company v2.5.0.0



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.

*				Calls to	r Customer DERUUI - E	PO: Version 2.5.0.3 - Ex	ample Comp	any v2.5.0.0		
Home Equ	uipment / Locat	ions	Contract Fir	ance / HR	Inventory Maintenar	nce / Projects Manufac	turing Pro	curement Sales Service Rep	orting Util	ities — 🗗
	+	Refre	Default	🔯 Save Li	ayout 🚜 My Call Naces 🕶 🎿 Assign	Close Complete Hol	A Pending	Release Print Reports		
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laintain 🦼	St	tate		J Forma	t a Work a	Proce	SS	a Print a Repo a		
Find O Fil	ter				by that column					
	-		CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
		ę	* 0 ¢	-	10: 15	10° A	* 0 ¢	*D:	100	100
nformation	No Of Calls		E CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Administration
💿 Durban	72	*	CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
New	28	- 11	E CN0000800	15/11/2018	Awaiting Accentance	Bianca Du Toit	10:53:13	Conjer not working properly	INSP	Inspection
In Progress	3	- 11	CN0000740	04/05/2018	Awaiting Acceptance	Balinda Sharman	08-00-00	TT008 - Mono 1000, Colour 1000 - Call	SM	Scheduled Maintenanc
🕑 Hold	0	- 11	CN0000740	14/03/2018	Awarung Acceptance	Delinua Sharman	11-01-47	hote - Hono 1000, Colour 1000 - Call.	NDD	New Deal Deated
Pending	3	- 11	CN0000569	14/05/2018	Unassigned		11:01:47	test	NUR	New Deal Rental
Complete	4	- 11	E CN0000567	12/03/2018	Unassigned		16:19:00	TestNDRLssueTeamJohn	NDS	New Deal Sale
O Closed	34		CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
	72		CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
Pretoria	0		CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
O New	0		+ CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty daim with parts only	TEST	Testing
In Progress	0		CN0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
Dending	0		CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
Complete	0		E CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST	DR	Select Call Type
Closed	0	~ -	E CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenano
O All	0		CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
Cape Town	0		CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
O New	0	-	E CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR.	Parts Requirement
In Progress	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
() Hold	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Pending	0	-	E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Complete	0				a seep to rec					
Closed	0		Count: 31							
	0	+ 4								

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.

- 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.

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

4. Click on Assign.



-		1-		Calls for	Customer DER001 - B	PO: Version 2.5.0.3 - Ex	cample Compa	any v2.5.0.0		
Home Equi	ipment / Locat	ions	Contract Fir	nance / HR	Inventory Maintenan	ce / Projects Manufac	cturing Proc	curement Sales Service Repo	rting Utili	ies — 🗗
	+	Refre	Default	🔯 Save La	yout 🚜 My Call aces 🕶 🥰 Assign	Close Complete Ho	A Bending	Release Print Reports		
			Hy Caus	🐐 Save Fil	ter Start					
aintain 🔺	St	tate		J Format	/ Work /	Proce	ess	A Print A Repo A		
Find O Filt	er	3		r here to gr 🥑	by that column					
			CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
		1	n 🖬 c	-	A D C	A D C	#OC	A C	a 🗖 c	n 🗖 c
formation	No Of Calls		CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Administration
Durban	72	â F	E CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
New	28		CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
In Progress	3		CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Cal	SM	Scheduled Maintenan
Hold	0	-	CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
Complete	3		± CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
Closed	34	-	CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
O All	72		CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
Pretoria	0	- 11	CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
O New	0	1	CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty daim with parts only	TEST	Testing
In Progress	0	11-	CN0000660	10/07/2017	Awaiting Accentance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
🕗 Hold	0	- 11	 CN0000444 	20/04/2017	Awaiting Acceptance	Judith Mudzenni	12:42:57	Retest	NDR	New Deal Rental
Pending	0		CN0000440	13/04/2017	UnAssigned	Sumarr Notecity	13:31:57	Return all from short term contract ST	DR	Select Call Type
Complete	0		E CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenand
O Closed	0	-	CN0000434	04/04/2017	LinAssigned	oran da oran mari	08-40-25	Warranty	SEDV	Service
	0	-	CN0000431	30/03/2017	Awaiting Accentance	Judith Mudzengi	10-35-03	Installation Testing team	INST	Installation
Cape Town	0	-	E CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10-20-10	Parts registrement	DD	Darte Deguirement
In Progress	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non-dient location	INST	Installation
() Hold	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Pending	0	-	CN0000421	16/02/2017	Awaiting Acceptance	Pianca Du Toit	10:33:12	installation at non client location	INCT	Installation
O Complete	0		CH0000421	10/03/2017	Awarung Acceptance	Didnica Du Tolt	10.55;12	installation at non client location	1451	Installauofi
O Closed	0		Count: 31							
0 41	0	+ 4								

- 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 N	lo. : CN0000801 - BPO: Ve	rsion 2.5.0.3 - Ex	ample Compar	ny v2.5.0.	0			_		x
	Home	Equipment / Local	tions Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	Ð	×
E Save	Back Sa	ave Layout View	v Call												
Proce	ess 🖌	6at Vie	w a												$^{\diamond}$
	Assigned	To	a short term contr	▼ * act.											
						v									
As	ssignment D	ate 14/07/2021	• 14:25:0	5 🗘 *											
	Assigned	By Julanda Kess	ler	* *											
		Create new	Work Order	1											
Ope	en Work Ord	Prag a colum	WOCode WOCode WO0002279	group by that color Description Call against a sho	t term contrac	t									
Open W	indows 🕶							User : JulandaK	14/07/2	021 Versi	ion: 2.5.0.3	Example Co	mpany v2	5.0.0	11.



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*.

-	1-	_		Calls for Cust	omer DER001 - BPO: V	ersion 2.5.0.3 - Exam	ple Company v	/2.5.0.0		
Home Equi	ipment / Locations	s i	Contract Final	nce / HR Inv	ventory Maintenance	/ Projects Manufact	uring Procure	ment Sales Service Reporting	Utilities	- 8
	- 1	45	Default	🔯 Save La	yout 🚜 My Call					
		G		Worksp	aces 🔻 🍇 Assign					
d Edit	- R	Refres	sh My Calls	Save Fi	ter Start	Close Complete I	Hold Pending	Release Print Reports		
laintain	State	p		Eormat		Pro	2290	Print Repo		
and the second s	-							a cons a repro a		//
Find O Fil	ter <u>3</u>	Y			Sat column					
2			CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDe
		V	8 8 0	=	R C	8 🛛 C	* 0 ¢	* 0 ¢	REC	REC
nformation	No Of Calls	F	CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Administrat
Durban'	72 *		CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
🕑 New 🕨	28		CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
In Progress	3		E CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call	SM	Scheduled
Hold	2		CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal F
Complete	4		CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal S
O Closed	34		CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal
O All	72	17	CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal S
Pretoria	0		CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
New	0		CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty daim with parts only	TEST	Testing
In Progress	0		CN0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal !
(E) Hold	0		CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal I
Pending	0		CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST	DR	Select Call
Complete	0 0		CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled
Closed	0		CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
Cape Town	0		CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
A New	0		CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Reg
In Progress	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
() Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Pending	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Complete	0		and by her		the start of the start of the	and the fort	20100122	and the second second second second		
	0		Count: 31							
Closed		-								

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



	6—		Time Logg	ing Express	- BPO: Version 2.5.0.3 -	Example Compa	ny v2.5.0.0				0	_ 0	x
Home Equ	ipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	•	- 8	х
🕜 🔞 🛓	3												
Start End Work Pr	int												
Work Process	7												\sim
100003													
Employee	Julanda Kessler		-										
Call	CN0000817	•	test call for errone	eous time log e	entry. –								
Work Order	WO0002309	•	test call for errone	eous time log e	entry. –								
					Ψ.								
Equipment	2020-1111		Drum		*								
					7								
Location					*								
Work pat started													
work not started.					<u> </u>								
					-								
Open Windows 🕶						User : Jul	andaK 15/07	/2021	Version : 2.5.0	.3 Examp	ple Compa	ny v2.5.0.	.0 //

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*.



	6-		Calls for Cust	omer DER001 - BPO: V	ersion 2.5.0.3 - Example	e Company v2	.5.0.0		_ D X
Home Equ	ipment / Location	ins Contract Fir	nance / HR Inv	entory Maintenance	Projects Manufacturir	ng Procurem	ent Sales Service Reporting	Utilities	_ & ×
Add Edit	+ F	Refresh My Calls	Save La Workspa Save Fil Format	yout & My Call aces ter Assign Work 4	Close Complete Hol	d Pending	Release Print Reports		\$
@ Find O Fi	ilter	Drag a column hea							
	-7	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
	\mathcal{X}	9 x0c	=	R C	8 C	* D ¢	4 D 4	ROC	8 0 0
Information	to Of Calls	CN0000765	10/07/2018	Rejected by Tech	Bianca Du Toit	13-14-73	Auto call invoice test	INSP	Inspection
👻 🖸 Durban 🧖	72 4	CN0000432	31/03/2017	LinAssigned	Dianea Da Tore	12:12:45	Work Mat - call - work order linked to c	DED	Denair
New	28	CN0000432	31/03/2017	UnAssigned		12.12.45	Work Mat - call - work order linked to c	DED	Denair
In Progress	3	CN0000735	23/11/2015	Accepted	Wesley Havnes	12:16:03	test cross reference on report	NDS	New Deal Sale
🕑 Hold	0	CN0000233	06/02/2015	Rejected by Tech	Rianca Du Toit	00.20.25	test closs reference on report	CEDV	Service
Pending	3	1 1 10000120	00/03/2013	Rejected by rear	Dianea Da Tore	03.03.23	cor.	JUK V	Service
Closed Al Closed Al New In Progress Hold Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Al Complete Closed Complete Closed	34 72 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	B							
O Closed	0	Count:	5						
O Al	0 .	* * _)					+
Open Windows 🕶						User : Julan	daK 14/07/2021 Version : 2.5.0.3	Example Com	pany v2.5.0.0

- 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



			Calls	for Customer	r DER001 - BPO: Versio	n 2.5.0.3 - Example Co	ompany v2.5.0	.0		X
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@ End O E	ltor	Dra								
	itei	1	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	Cal
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Information	No Of Calls		- CN0000765	10/07/0010	Defected by Tech	Diagon Du Taib	10-14-00	Note and involve heat	THEO	
👻 💽 Durban	72 🔺		CN0000765	10/07/2018	Rejected by Tech	bianca Du Toit	13:14:25	Auto call invoice test	INSP	Ins
New	28		CN0000432	31/03/2017	UnAssigned		12:12:45	work Mgt - call - work order linked to c	. REP	кер
In Progress	3		CN0000432	31/03/2017	UnAssigned		12:12:45	Work Mgt - call - work order linked to c	. REP	Rep
Hold	0	•	CN0000235	23/11/2015	Accepted	Wesley Haynes	12:16:03	test cross reference on report	NDS	Nev
Pending	3		CN0000126	06/03/2015	Rejected by Tech	Bianca Du Toit	09:39:25	test	SERV	Ser
O Complete	4									
Closed	34									
🖸 All	72			Inpu	t Validation <	5		×		
- Pretoria	0					12				
					Are you sure you	want to close this call,	reference no. (N00002352 It		
New	0									
New In Progress	0	-			cannot be reope	ned. Answer 'Yes' to clo	se the call.			
New In Progress Hold	0 0 0				🥑 cannot be reope	ned. Answer 'Yes' to clo	se the call.			
New New In Progress Hold Pending	0 0 0 0				Cannot be reope	ned. Answer 'Yes' to clo	se the call.			
 New In Progress Hold Pending Complete 	0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	se the call. Yes	No		
 New In Progress Hold Pending Complete Closed 	0 0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	yes	No		
New In Progress Hold Pending Complete Closed All	0 0 0 0 0 0 0 0	3 2 3 3 2 3 2 3 2 3 2 3 2 3 2 3 2 3 2 3			cannot be reope	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Colored All Cape Town	0 0 0 0 0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Closed All Cape Town New	0 0 0 0 0 0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Closed All Cape Town New In Progress	0 0 0 0 0 0 0 0 0 0 0 0 0				6	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Closed Al Electron New In Progress Hold	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Closed Al Cape Town New In Progress Hold Pending	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Closed Al ORew In Progress Al New In Progress Hold Pending Complete	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				cannot be reope	ned. Answer 'Yes' to clo	Yes	No		
New In Progress Hold Pending Complete Closed Al Cape Town New In Progress Hold Pending Complete Closed	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		Count: 5		cannot be reope	ned. Answer 'Yes' to clo	Yes	No		

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*.



₽ _₹		6	_	Calls	for Customer	DER001 - BPO: Version	n 2.5.0.3 - Example Co	mpany v2.5.0.	.0		
	Home Equi	pment / Locations	Co	ontract Finan	ce/HR Inve	ntory Maintenance / Pi	rojects Manufacturin	g Procuremen	nt Sales Service Reporting 🕑	- 6	문)
Add	Edit		Refres	Default	Worksp	aces • 🍇 Assign	Close Complete H	Iold Pending	Release Print Reports		
Maint	ain	Stat	e		Format	Work	Pro	9	Print Repo		6
					-						
Find	d Ofi	ter		g a column heade							
	7		8	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	C
	$-\Lambda$		Ύ.	Bc	=	R D C	a 🗖 c	REC	#∎c	NBC	- 1
Infor	mation	No Of Calls	Ð	CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	A
- 0	Durban	72 1		CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Ir
	New '	28	1	CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Ir
	O In Progress	3	•	CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call	SM	S
	Pending	3		CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	N
	Complete	4	-	CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	N
	O Closed	34	-	CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	N
	() All	72	-	CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	N
- 🖸	Pretoria	0		CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	S
1.7	New	0	1	CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty daim with parts only	TEST	T
	In Progress	0	-	CN0000660	10/07/2017	Awaiting Accentance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	N
	🕑 Hold	0		CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzenni	12:42:57	Retest	NDR	N
	Pending	0		CN0000440	13/04/2017	UnAssigned	Sourcering	13:31:57	Deturn all from chart term contract ST	np	
	Complete	0 U		CN0000622	11/04/2017	Awaiting Acceptance	Rolinda Charman	08:00:00	TT002 Monthly Call per WO	SM	5
	Closed	0		CN0000424	04/04/2017	Up Assigned	Demilia Sridi Illan	09:40:25	Warranty - Call per WO	CEDV	5
		0		CN0000434	20/02/2017	Augiting Assestance	Tudith Mudaanai	10:25:02	Installation Testing team	INCT	5
- 2	Cape Town	0		CN0000431	20/03/2017	Awaiting Acceptance	Judith Mudzengi	10:55:03	Destroyer instant	11451	II II
	New In Deserver	0	-	CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PK	P
	D Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	bianca Du Toit	10:33:12	Installation at non client location	INST	Ir
	Rending	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	Installation at non client location	INST	Îr
	Complete	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir
	Closed	0		Count: 31							
	O All	0 -									

- 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.



	∓ Home Equi	oment /Location	15	Calls Contract Finan	for Customer	DER001 - BPO: Versio	n 2.5.0.3 - Example Co Projects Manufacturir	ompany v2.5.0	.0 nt Sales Serv	ice Reporting 🕑		-) (:
Add Mai	Edit	T Sta	Refi	Default	Contraction of the second seco	iyout aces • ter Work a	Close Complete Pro	Hold Pending	Release Print	Reports		
○ F	ind O Fi	ter										
				CallReference	CallDate	CallState	Technician	CallTime	Description		CallType	0
				all c	=	allic	all c	alle	ADC.		HEC.	
Infi	ormation	No Of Calls	1	CN0000817	15/05/2010	Augiting Assestance	hilanda Kasalar	16.24.07	test call far arran	eeus time lee entru	ADM	
Ŧ	💽 Durban	72 4	-	CN0000817	15/05/2019	Awalung Acceptance	Julariua Kessier	11.52.20	Call against a she	eous une log eru y.	THED	
	New	28	1 -		15/11/2010	UnAssigned	Disease Du Tait	11:55:58	Call against a shu	rt term contract.	INSP	
	In Progress	3	11.		15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not workin	ig properly	INSP	
	🕑 Hold	0	1	CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	11008 - Mono 10	00, Colour 1000 - Call	SM	
	Pending	3	Ш-	CN0000569	14/03/2018	UnAssigned		11:01:47	test		NDR	
	Complete	4		CN0000567	12/ Input Va	lidation ┥	5		\times	John	NDS	
	Closed	34		CN0000566	12/		100				NDR	
		72	Н.	CN0000564	09/		nt to complete this cal	I reference no	CN00007402		NDS	
Ŧ	Pretoria	0		E CN0000563	27/	Answer 'Yes' to com	plete the call.	i, reference no.	CN0000740:	quired	SERV	
	New	0		CN0000513	02/					n parts only	TEST	
	In Progress	0		CN0000660	10/					rice	NDS	
	() Hold	0		CN0000444	20/	6	> [Yes	No		NDR	
	Pending	0	11	+ CN0000440	13/					rt term contract ST	DR	
	Complete	0	-	CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly	- Call per WO	SM	
	Closed	0		CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty		SERV	
_	Cape Town	0	1	CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testin	ig team	INST	
*	New	0	-	E CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	t	PR	
	In Progress	0	-	E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at nor	dient location	INST	
	() Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at nor	dient location	INST	
	Pending	0	-	+ CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at nor	dient location	INST	
	O Complete	0		CN0000421	10/03/2017	Awalung Acceptance	Dianted Du Tuit	10:55:12	installa uorr at hor	i dichiciocadoni	1451	
	O Closed	0		Count: 31								
	() Al	0 .	- 4									

- 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



₹	Home Equi	ament / Location		Cal	lls for Custome	r DER001 - BPO: Versio	n 2.5.0.3 - Example Co	ompany v2.5.0	.0		
dd I	Edit		Ref	Default [fresh My Calls [Save L	ayout baces • & Assign ilter & Start	Close Complete H	Hold Pending	Release Print Reports		U.
				Dense and the base	a reme	he the back are			a 1000 a 10000 a		
Find (() Fi	ter		Callba farman	CallData	Colletate	Technisian	Califiana	Description	CallTime	/
				CallReference	CalDate	CaliState	Technician	Calltime	Description	Call ype	-
Informa	tion	No Of Calls		¥ R <u>∎</u> C	_	REC	* U C	REC	R C	REC	_
	Durban	72		CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	
· •	New New	27	n.	CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	
2	In Progress	3		CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	
2	Hold	0		CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	
6	Pendina	3		CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	
0	Complete	5		CN0000566	12/03/2018	Call Deservine			~	NDR.	
Ċ	Closed	34		CN0000564	09/03/2018				^	NDS	
Closed 3 All 7		72	CN0000563		27/02/2018		1		e service required	SERV	
- 🖸	Pretoria	0		+ CN0000513	02/08/2017	The call refe	rence CN0000740 has l	heen completer	ty daim with parts only	TEST	
(New	0		CN0000660	10/07/2017			been complete	3 Month Service	NDS	
(In Progress	0		CN0000444	20/04/2017					NDR	
	Bold	0		+ CN0000440	13/04/2017				all from short term contract ST.	DR	
	Pending	0		+ CN0000633	11/04/2017	•		OK	- Monthly - Call per WO	SM	
(Complete	0	0	+ CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	
9	Closed	0		CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzenni	10:35:03	Installation Testing team	INST	
-	All	0		CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	
- 🔤	Naw	0	-	E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	
		0	-	+ CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non dient location	INST	
2	B Hold	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Pianca Du Toit	10:33:12	installation at non-client location	INCT	
- i	Pendina	0	-	CN0000421	16/03/2017	Awaiting Acceptance	Dianca Du Tolt	10:35:12	installation at non client location	INCT	
0	Complete	0		CN0000421	16/03/2017	Awarung Acceptance	bianca Du Toit	10:33:12	Installation at non-client location	11VD1	
Ċ	Closed	0		Count: 3	0						
	All	0	+	4							

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 <u>SLA Monitor</u> 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*.



+ Home	6 Equipment / Loca	ations	Contract Finan	ce / HR Invi	r DER001 - BPO: Versio	n 2.5.0.3 - Example C	ompany v2.5.0	1.0 ent Sales Service Reporting 🖲		
Add Edit		Ref	Default	Image: Save L Image: Works Image: Save F Image: Save F Image: Formation	ayout baces • & Assign ilter 1 Start it Work 4	Close Complete	Hold Pending	Release Print Reports		
Find	O Filter		ag a column heade							
		_	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	C
	\mathcal{T}	_	* 0 ¢	-	A D C	* 0 ¢	8 0 0	* 0 ¢	NEC.	
Information	No Of Calls	;	CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	A
👻 💽 Durban	72	^	CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	P
New	27	_	CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	I
In Pro	gress 3		CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	N
() Hold	0	_	+ CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	1
Pendi	ig 3	- 11	CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	
Comp	ete 5	- 11	CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	N
O All	72	- 11	CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	
- 🖸 Pretoria	0		CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty daim with parts only	TEST	
New	0	-	 CN0000660 	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	,
In Pro	gress 0		CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	
🕑 Hold	0		CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST	DR	
Pendi	ig O		E CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	
Comp	ete 0		CN0000434	04/04/2017			08:49:25	Warranty	SERV	
Close	0	_	CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	
	0		CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PP	
Cape Tov	n U	- 1	E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non-client location	INST	
O In Pro	aress 0		E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	
C Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non-client location	INCT	
Pendi	- 0 pi		CN0000421	16/02/2017	Awaiting Acceptance	Pianca Du Toit	10:33:12	installation at non client location	INCT	
Comp	ete 0		CN0000421	10/05/2017	Awarung Acceptance	Dianca Du Tolt	10:55:12	installation at non client location	1451	
O Close	0		Count: 30							
	0	-	4							

- 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



	5		Call on Hold	: CN0000817	7 - BPO: Version 2.5.0.3	Example Comp	any v2.5.0.0						
Home Eq.	ipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	•	- 0	7 x
Save Back	6												\$
Hold Date Reason Code	15/07/2021 -	15:58:08	÷ *										
Hold Reason					* *								
Estimated Release Date	17/07/2021 Julanda Kessler	15:58:08	•										
Open Windows 🕶						User : Ju	landaK 15/07/	2021 V	ersion : 2.5.	0.3 Examp	ole Comp	bany v2.5.	0.0 //.

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 <u>SLA Monitor</u> 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*



a =		0	_		Calls for Custo	mer DER001 - BPO: Ve	rsion 2.5.0.3 - Example	Company v2	.5.0.0		_
H H	ome Equi	ipment / Location	ns	Contract Finan	ce / HR. Inve	entory Maintenance /	Projects Manufacturing	Procureme	ent Sales Service Reporting	Utilities	_ & ×
Add Edit			Refre	Default 🔲	Workspa	yout 🥵 My Call aces 🕶 🍇 Assign ter 🍄 Start Work 4	Close Complete Hol	A Pending	Release Print Reports		\$
Find	OF	lter	4	ag a column heade							
	2			CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
	/		ł	#DC	-	R C	#Oc	R O C	4 0 ¢	n C	n 🖬 c 📩
Information	1	No Of Calls	- È	CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
🕨 👻 💽 Duri	ban 🔽	72 4	: [E CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
<u> </u>	New -	26 3		CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Re
	In Progress	3	1	CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sa
e e	Pending	3		CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Re
ă	Complete	5	11	CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sa
ŏ	Closed	34	11	CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
0	All	72	11	CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty claim with parts only	TEST	Testing
👻 💽 Pret	toria	0		CN0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sa
0	New	0		CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Re
0	In Progress	0		CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST	DR.	Select Call T
. 0	Hold	0	11	CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled M
	Pending	0	11	CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
ő	Closed	0	1	CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
ő	All	0	-	CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requir
- 🖸 Cap	e Town	0		E CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
0	New	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
0	In Progress	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
0	Hold	0		CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
O	Pending	0		CN0000357	23/06/2016	Awaiting Acceptance	Bianca Du Toit	10:20:00	test	NDS	New Deal Sa
0	Complete	0									
0	Closed	0		Count: 29							
0	All	U 7	- 4		2						
Open Windows	s 🕶							User : Juland	laK 16/07/2021 Version : 2.5.0.3	Example Compa	ny 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



	6-		-> Call in Pe	nding : CN00	00801 - BPO: Version 2.5	.0.3 - Example O	Company v2.5.0	.0				-	
Home E	quipment / Locations	Contract	Finance / HR.	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8 ×
Save Back													
	7												~
Process 🔺													~
Pending Date	16/07/2021 -	11:22:37	^										
Bassan Code			•										
Reason Code													
Reason	' '				<u>_</u>								
5	10/07/2021		•		Ŧ								
Estimated Release Date	18/07/2021 ¥	11:22:37	•										
Employee	Julanda Kessler		•										
Open Windows 🕶							User : JulandaK	16/07/202	21 Vers	ion: 2.5.0.3	Example Con	npany v2.5	.0.0 //

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*.



Þ =	1	Calls	s for Custome	er DER001 - BPO: Versio	n 2.5.0.3 - Example	Company v2.5.0	0.0		x
Home Equ	ipment / Locations	Contract Finan	ice / HR Inv	entory Maintenance / I	Projects Manufactur	ring Procureme	ent Sales Service Reporting) — é	9 x
Add Edit	+ R	Default Calls	Save L	ayout 🦑 My Call paces - 🦓 Assign Filter 👔 Start Work	Close Complete	Hold Pending	Release Print Reports		~
		and the second second		- Secold and and					
Find	lter	Callba faces as	Callbata	C-IIChete	Technician	CallTina	DeserieFee	CallTown	C-1
		Calikererence	CaliDate	Calistate	Technican	Cairime	Description	Call ype	Ca
Information	No Of Calls	Y REC	-	a 🖬 c	R D C	REC	R C	NEC.	10
	72	CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Adr
Pending Complete Coload All Pretoria New In Progress Hold Pending Complete Closed All Pretoria Pretoria New In Progress Hold Pending Complete Closed All Pending Complete Closed All Pending Complete Closed Pending Complete Closed	3 5 34 72 0 0 0 0 0 0 0 0 0 0 0 0 0	(a)							
	0 +	4							
	¥ *	1							

- 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 Cu	stomer HOP001 - BPO:	Version 2.5.0.3 - Exam	ple Company	v2.5.0.0			_ – ×
Home Ec	quipment / Locatio	ons	Contract Fin	ance / HR I	nventory Maintenance	e / Projects Manufactu	uring Procure	ement :	Sales Service Reporting) Utilities	_ & ×
Add Edit	* st	Refr	Default resh My Calls	Save Li Worksp Save Fi	ayout & My Call waces • & Assign Iter & Start t & Work	Close Complete Ho	old Pending	Release	Print Reports		\$
	-1.								Items Issued		- /
I Hind Of	liter	_	CallPafarance	CalData	CallState	Technician	CallTime	Descriptio	Delivery Report		TupeDecc
							all continue	enc.	Functional Location S	ervice History	1 ypebesc
Information	No Of Calls			17/07/0004	Participan d			Ter Co	WO Papart - WO Cod	a WO0006116	0
- 🖸 Durban	465	- 1	E CN0005269	1//0//2021	UnAssigned		08:00:00	Tier - Cor	WO Report - WO Cou	E 1100000110	callation
New	63	n -		18/06/2021	UnAssigned		08:00:00	2MS - 2 n	nonth service	SM	Scheduled Mainte
In Progress	5 7	- 11	E CN0005260	17/06/2021	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
🕗 Hold	226		⊞ CN0005255	18/05/2021	Unassigned		08:00:00	Tier - Cor	mmercial Her Test	INST	Installation
Pending	0	-		17/04/2021	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
O Complete	51		E CN0005248	1//04/2021	UnAssigned		08:00:00	2MS - 2 n	nonth service	SM	Scheduled Mainte
Closed	118		⊞ CN0005188	23/03/2021	UnAssigned		13:48:24	OR00002	94	IMP	Implementation
	465			17/03/2021	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
Pretona	11			18/02/2021	UnAssigned		08:00:00	2MS - 2 n	nonth service	SM	Scheduled Mainte
	0	11	CN0005233	17/02/2021	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
() Hold	4		CN0005187	10/02/2021	UnAssigned		09:26:19	RSI1212		NDS	New Deal Sale
Pending	1			16/01/2021	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
O Complete	0	υ.		18/12/2020	UnAssigned		08:00:00	2MS - 2 n	nonth service	SM	Scheduled Mainte
Closed	6			17/12/2020	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
O All	11			17/11/2020	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
👻 🔯 Cape Town	0			17/10/2020	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
New	0			17/10/2020	UnAssigned		08:00:00	2MS - 2 n	nonth service	SM	Scheduled Mainte
 In Progress 	s 0			17/09/2020	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
(E) Hold	0			18/08/2020	UnAssigned		08:00:00	Tier - Cor	mmercial Tier Test	INST	Installation
Pending	0			18/08/2020	UnAssigned		08:00:00	2MS - 2 n	nonth service	SM	Scheduled Mainte
Complete	0									1	
Closed	0		Count: 63								
O AI	U	▼ 4	<u> </u>								+
Open Windows 🔻							User : J	ulandaK	19/07/2021 Version : 2.5.0.	3 Example C	ompany 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 <u>selected</u> Customer.



Ŧ					Calls for C	ustomer TIA0	01 - BPO: Version 2.4.0.11 - Exa	mple	Company				
Home Equi	ipment / Locations	Contract Fin	ance / HR Invent	ory Mainter	nance / Projec	ts Manufact	uring Procurement Sales	Ser	ervice Reporting Utilities			-	8
	- 45	Default	🔯 Save Layout	🚜 My Cal	~		1 🛤 🕨 🚇	1	~				
			Workspaces 🔻	🚜 Assign	-								
Add Edit	- Refre	esh My Calls 🛄	Save Filter	Start Start	Close (Complete Hold	Pending Release Print	Rep	ports				
Maintain	State		Format	Work		Proces	s Print		Name	Description			
			-						0	0		1/	
Find O Filt	er								- Service Centre				
		CalReference	e CallDate	CallState	Technician	CallTime	Description	H.	- 🕐 Calls		rorCodeDesc	SerialNo	Ctri
		• ADC	-	1 0 0	(D)	4 0 0	(0)		Calls All with SLA Zone	All Open Calls With SLA Zor)c	1 0 0	-0
Information	No Of Calls	E CN000082	28 31/01/2020	UnAssigned		13:05:54	Test call for new swap out function		Calls: All Calls	Call analysis report		1912-102037	
👻 🔯 Durban	36	CN000063	38 20/04/2017	Awaiting Ac	Belinda Sha.	. 08:00:00	TT018 - Bi-annually, Mono 1000 -	<	Calls: Call List	Call List		19-12-1207	
New	11	CN000060	13 23/02/2017	Awaiting Ac	Bianca Du T	08:00:00	TT072 - 2 Monthly - Call per WO		Calls: Closed in Period	Calls dosed in period show			Sou
In Progress	0	. CN000060	23/02/2017	Awaiting Ac	Bianca Du T	08:00:00	TT072 - 2 Monthly - Call per WO	-	Calls: Linked to Tasks	List of all Service calls that		2020-10201	
() Hold	0	CN000036	1 23/06/2016	Rejected by	Relinda Cha	12-21-27	hart		Calls: Repeats	Call Repeats			
Pending	0	CHOODOJ	25/00/2010	Augebles As	Caralian Cu	20.52-00	Test marking	-	Calls: With Open Work Order	Call centre listing with call r		10.10.1007	
Complete	4	CNOODOIL	20/02/2015	Awalung Ac	Carolina Su.	. 09:52:00	Test machine Meanable because and	-	Calls: Work Order Labour Info	Call centre performance re		19-12-1207	
Closed	21		11/11/2014	Awareng Ac	George Jam.	10:17:59	Magenta toner required		Housekeeping			19-12-1207	
O AI	36	CN000006	51 19/08/2014	Awaiting Ac	Wesley Hay.	10:06:08	Toner to be delivered		Performance			19-12/1201	
+ O Pretona	0		59 08/08/2014	Awaiting Ac	Wesley Hay.	12:27:58	Full set of toners required		 O Troubleshooting 			19-12/1201	
O In Danama	0	CN000003	55 07/08/2014	Awaiting Ac	Belinda Sha.	12:14:38	Toner required					20-12345-5	
O Hold	0	CN000004	47 31/07/2014	Awaiting Ac	George Jam.	14:13:49	Service required					19-12-1207	
C Rending	0							4 ⊂	\sim	+			
Complete	0							\checkmark		Edit Filter			
O Closed	0							×					
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In Progress	0 .												

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