

SALES

CUSTOMERS - WORK ORDER REPORT

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the Customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* for the Customer.
 - The example has *Active* selected.
- 4. Select the *row* of the Customer whose Call information you would like to work with.
- 5. Click on the *Call History* tile.



				1		Customer Listing -	BPO: Version			iy v2.5.0.0		_	
-	Home	Equipm	ient /	Locations	Contract Fi	nance / HR Inventory M	Maintenance / F	Projects I	Manufacturing	Procurement Sales	s Service Reporti	ng Utilities —	B
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Addre			•	HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654
Audi	cooco	5		ER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/765
		1	(OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456
			1	'ES001	CO	Young Electric			Durban	100,000.00		082555555	231468
Docu	ments		1	VES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456
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Call H	iistory 🤟			SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456
			1	DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654
			F	AN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456
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			F	PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
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			(GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456
Equip	ment		F	IN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
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Contr			1	AN002	Π	Dancing Shoes			Durban	10.000.00		031 123 4567	12345
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PRINT WORK ORDER REPORT

- 6. The *Calls for Customer* [] screen will be displayed.
- 7. Select the *Site* and *Call Status*.
 - The example has *Durban* selected and the status has been set to *In Progress*.
- 8. Click on the *row* of the Call you wish to print the work order report for.
- Click on *Print* and select *WO Report WO Code []* from the Print Options menu.



Work Order Report

		6		C	alls for Cust	omer HOP00	01 - BPO: V	ersion 2.5.0.3 - Exampl	e Company v2	2.5.0.0		(_
H	lome Equi	pment / Locat	ions	Contract Finance	e / HR. Inv	ventory M	aintenance	Projects Manufacturin	g Procureme	ent Sales	Service Reporting	Utilities	_ & ×
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v 💽 Dur		465			05/02/2020	Accepted		Bianca Du Toit	11:57:15	1234	Customer Service Hi		ementation
		63	n Þ	E CN0000533	13/09/2017	Awaiting A	cceptance	Wesley Haynes	10:45:44	Service re	NO Report - WO Co	de WO0001587	er Required
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ŏ	Pending	0		CN0000423	16/03/2017	No Signatu	re	Judith Mudzengi	12:58:54	Issues Log	ging Auto Approve off	π	IT Requirement
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Open Window	s *								User : Julano	daK 16/07	/2021 Version : 2.5.0.3	Example Compa	any v2.5.0.0

- 10. When you receive the *Report Generation* message;
 - Do you want to print the WO report for WO []?
- 11. Click on Yes to proceed.

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Home Equ	ipment / Locati	ons	Contract Fina	nce / HR In	ventory Maintenance	e / Projects Manufact.	uring Procuren	nent Sales Service Reporting	Utilities	- B >
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👻 💽 Durban	465	-	E CN0000533	13/09/2017	Awaiting Acceptance	Wesley Haynes	10:45:44	Service required - remember to check	TON	Toner Require
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In Progress			CN0000518	07/08/2017	Rejected by Tech	Bianca Du Toit	12:10:49	New deal rental contract	NDR	New Deal Re
(E) Hold	226		CN0000423	16/03/2017	No Signature	Judith Mudzengi	12:58:54	Issues Logging Auto Approve off	П	IT Requireme
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In Progress	-									
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- 12. The Call Delivery Note for the Call will be displayed in the *Preview* window.
- 13. You can make cosmetic adjustments to the report, as well as *Save*,

Zoom, Add a Watermark, Export or Email.

14. *Close* the preview screen to return to the Calls for Customer screen.

Preview	12					_ _ _ ×
File View Backg	round					· ·
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13			Example	e Company v2.5.0.0	0	
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			Area		NewTown	
		mpany Logo 🎸	City		Durban	
	5		South Af	rica	South Africa	
			0000		1234	
			Reg No.:			
			VAT No.:		Tel No.: 031 123 4567	
	WOBarcode		Customer : Code :	Hope Works (Pty) Ltd HOP001	Tel No. : 031 123 45671 Contact : Jane. Alrich.	
			Area:	Main	Priority : 2	
			Billable :	NO	rhong, 2	
	Shipping Address	: Plot 91 Leaf Road		Call Date :	13/09/2017 00:00:00 10:45	
		LeafHills		Call Ref. :	CN0000533	
		Pink Town Durban South		Serial No. : Model No. :	18-30200	
		South Africa		Error Code :		
		1234		WO Code :	WO0001587	
	Machine Location	: reception		WO Desc :	Service required - remember to check drum	
	Contract No. :	CO000042		Inclusions :	CRFT PART	
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	Part Code	Part Description			Quantity	
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