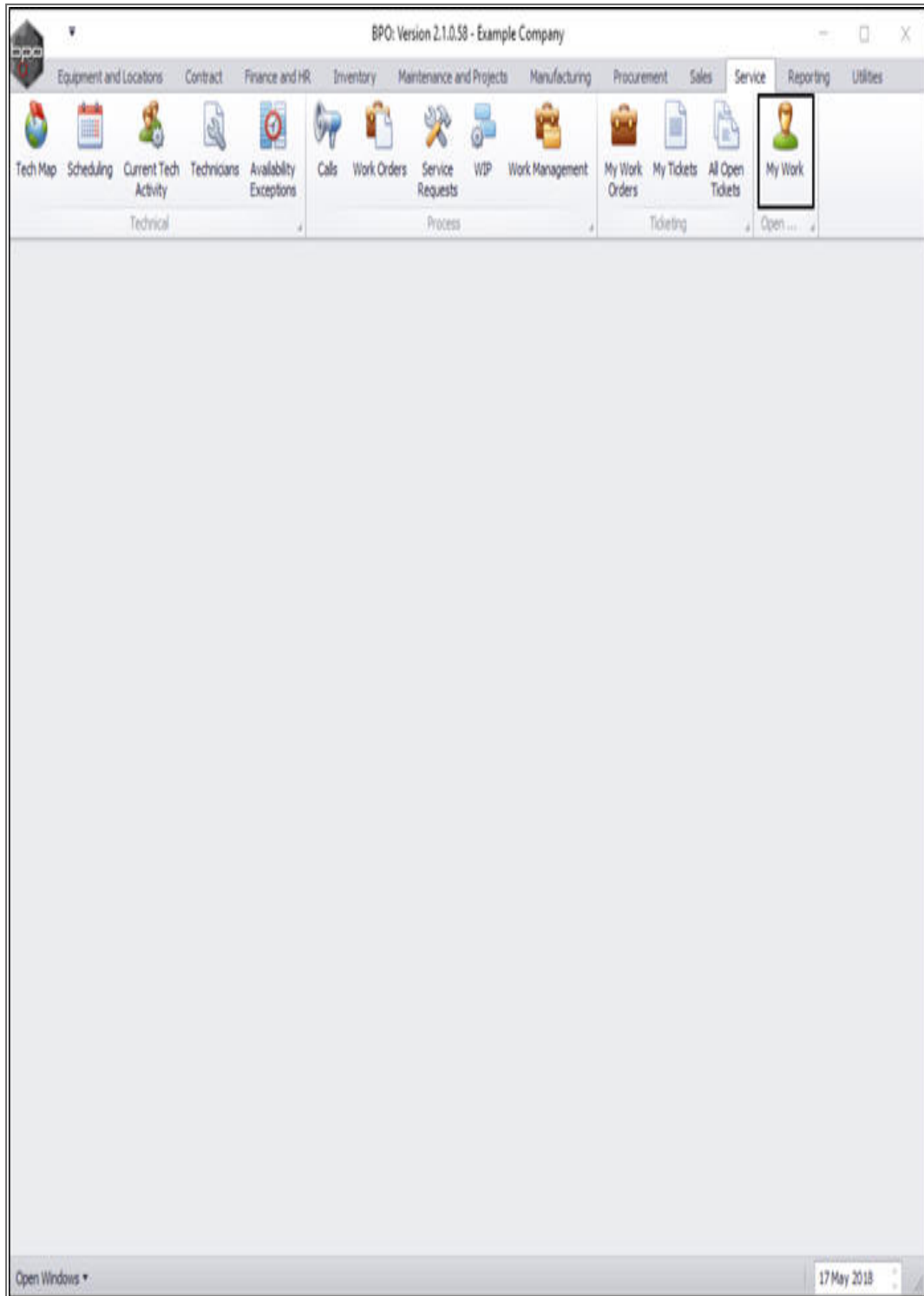


SERVICE

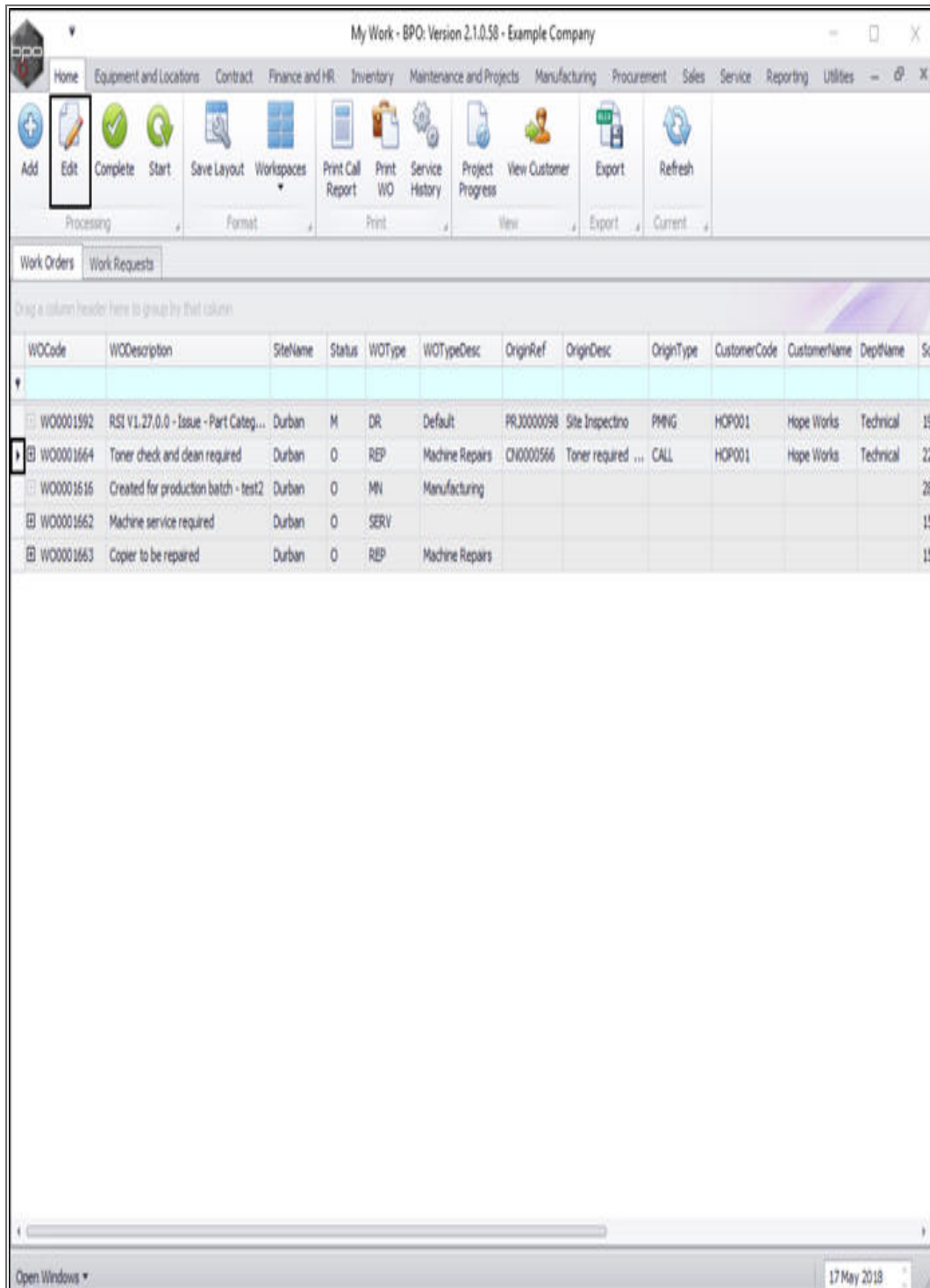
MY WORK – VIEW CUSTOMER INFO AND CUSTOMER NOTES

Ribbon Access: Service > My Work



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **view** the related **customer information**.
- Click on **Edit**.



My Work - BPO: Version 2.1.0.58 - Example Company

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

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

| WCode | WDescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | Sc |
|-----------|---------------------------------------|----------|--------|--------|-----------------|------------|--------------------|------------|--------------|--------------|-----------|----|
| WO0001592 | RSI V1.27.0.0 - Issue - Part Categ... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope Works | Technical | 15 |
| WO0001664 | Toner check and clean required | Durban | O | REP | Machine Repairs | CN0000566 | Toner required ... | CALL | HOP001 | Hope Works | Technical | 22 |
| WO0001616 | Created for production batch - test2 | Durban | O | MN | Manufacturing | | | | | | | 26 |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | | | 15 |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | | | 15 |

Open Windows 17 May 2018

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

- Click on the **Customer Info** tab on the right hand side of the screen.

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- The **Customer Info** docking panel will be expanded.
- Here you can view **Customer Info** details and any **Customer Notes**, if recorded.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links
Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Leases

Swap Outs

Meters

Expenses

Meters
Open Windows

17 May 2018

Description: Toner check and clean required

Requestor: Abigail Milne

WO Type: Repair

Priority: 2

Request Date: 18 May 2018 09:42:59

Status: 0 - Open

Billable: ☐

Capitalise: ☐

Work Order Item

Functional Location: ☐ Equipment: ☒

Item: 2020-103053

Comment: Check Colour Toner - not printing effectively

Customer Info

Customer Info:

Customer Code: HCP001 - Hope Works

Tel No: 031 123 4567

Contact No:

Account Code:

Status: A -

VAT No: 987654321

Hold Reason:

Address: Plot 91 Leaf Road Forest Hill New Town Durban South 1234

Is Debtor: ☒

Customer Notes:

| Notes | NoteDate | NoteTime | Full Name |
|---------------------------------------|-------------|----------|-----------------|
| Call customer to confirm order | 09 Feb 2017 | 11:21:51 | Judith Mudzengi |
| Existing third party contract pending | 18 Apr 2016 | 12:09:00 | Bianca Du Toit |
| Check toner yield | 04 Aug 2014 | 00:00:00 | Belinda Sharman |

- If you wish to see more customer information, go back to the **My Work** listing screen.
- Click on the **row selector** in front of the **work order** where you wish to **view** the **customer details**.
- Click on **View Customer**.
- Follow the instructions to [View the Customer](#).

My Work - BPO: Version 2.1.0.58 - Example Company

Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Add

Edit

Complete

Start

Save Layout

Workspaces

Print Call Report

Print WO

Service History

Project Progress

View Customer

Export

Refresh

Processing

Format

Print

View

Export

Current

Work Orders

Work Requests

Drag a column header here to group by that column

| WCode | WDescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | Sc |
|-----------|---------------------------------------|----------|--------|--------|-----------------|------------|--------------------|------------|--------------|--------------|-----------|----|
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| WO0001662 | Machine service required | Durban | O | SERV | | | | | | | | 15 |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | | | 15 |

Open Windows

17 May 2018

MNU.073.007