

SERVICE

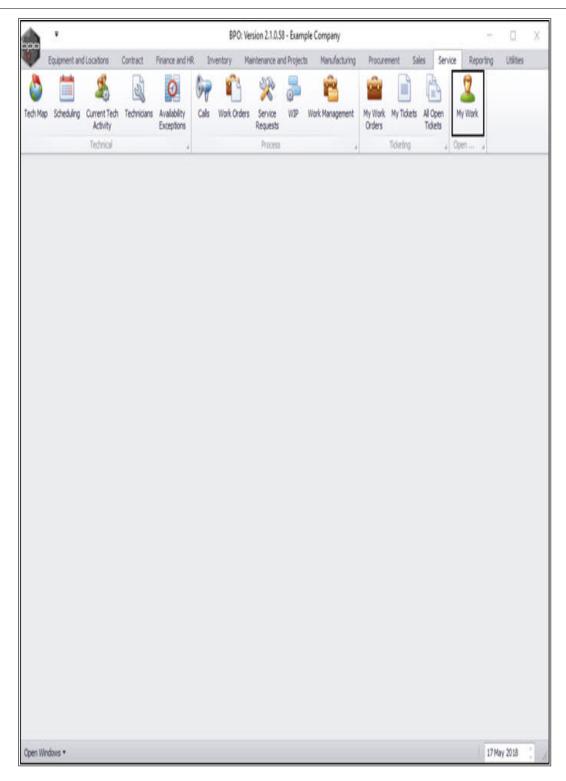
MY WORK - VIEW CUSTOMER INFO AND CUSTOMER NOTES

Ribbon Access: Service > My Work

Help v2.5.1.4 - Pg 1 - Printed: 27/06/2024



My Work - View Customer Info and Customer Notes



The *My Work* listing screen will be displayed.

Help v2.5.1.4 - Pg 2 - Printed: 27/06/2024



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

| W | ۷ | | | | М | y Work - Bi | O: Version | 2.1.0.58 - Example Ci | ompany | | | Ξ. | | Х |
|---------------|--------------|-----------------|----------------------------|-------------|----------------------|-------------|-------------|-----------------------|-------------------|-----------------------------|--------------|-------------------|------------|----|
| the second of | Home | Equipment and | flocations Contract | Finance and | HR: In | ventory I | Maintenance | and Projects Manu | facturing Procure | ment Sales | Service Rep | porting Utilities | - 0 | Х |
| Add | Color Edt | | art Save Layout W | orkspaces | Print Call Report | Print | | Project View Custon | ner Export | Refresh | | | | |
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| Work (| Orders | Nork Requests | | | | | | | | | | | | |
| Dilga. | ulum)er | der, hime to ge | ice by this calicon | | | | | | | | | | | |
| WOO | lode | WODescrip | otion | SiteName | Status | WOType | WOType0 | Desc OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | Depitivame | 8 |
| • | | | | | | | | | | | | | | |
| 1051 | 00001592 | | 0.0 - Issue - Part Categ | Durban | M | DR | Default | PR30000098 | Site Inspectino | PMING | HOP001 | Hope Works | Technical | 15 |
| 1000 | 00001664 | | k and dean required | Durban | 0 | REP | Machine R | | Toner required | CALL | HOP001 | Hope Works | Technical | 22 |
| | 00001515 | | r production batch - test2 | | 0 | MN | Manufact | uring | | | | | | 25 |
| | 00001662 | | ervice required | Durban | 0 | SERV | | | | | | | | 15 |
| E W | 00001663 | Copier to b | be repaired | Durban | 0 | REP | Machine R | Repars | | | | | | 15 |
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The *Maintain WO* screen will be displayed.

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



My Work - View Customer Info and Customer Notes

| Back Save Layou | ut Print | | | | | | | | | |
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| text to search P | o con queen | | | CALL Call Refe | | | 0000566 | | | |
| nctions | | | | PMING Project F | leference | | | | | |
| ine . | | | | | | | | | | |
| | Requestor | Abigal Mine • | • | | | | | | | |
| | WO Type | Repair • | • | Schedule : | | | - | | | |
| ervices | Priority | 2 | • | Assigned To | Abigal Mine | | | •• | | |
| | Request Date | Partnerset in the Committee of Partnerset in Committee | | Assigned By | Abigal Mine | | | •• | | |
| | | 0 - Open | | Scheduled Start | 22 May 2018 | • | 00:00:00 | :• | | |
| hird Party Services | Billable | | | Scheduled End | 22 May 2018 | • | 02:00:00 | :• | | |
| | Capitalise | | | Actual Start | and the second second | • | 00:00:00 | | | |
| wts' | - Work Order Item - | | _ | | 17 Jun 2018 | _ | 00:00:00 | | | |
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| | | | | Completion Date | 17 Jun 2018 | • | 00:00:00 | : | | |
| leters | | | | | | | | | | |



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

| | | | | | | - 8PO: Version 2.1.0.58 | | | | | 0 | |
|----------------------|---|---------------|---------------------|---------------------|-----------|---|-------------------|----------------------------|-------------|-----------------------------------|------|----|
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| text to sear | а сh., "Р | Descrip | tion Toner check an | nd dean required | | Customer Info | | | | | | |
| | iller P | | | | | Customer Info : | | | | | | |
| octions | | | | | | Customer Code | CID-140-940404 | (oris | | | | |
| ne | | | | | | | 031 122 4567 | | - | | | |
| | | Reque | tor Abigal Mine | | •• | Contact No. | | | | | | |
| | | WOT | ype Repair | | •• | Account Code | - | | | | | |
| ervices | | Pric | rity 2 | | • | Status | | | | | | |
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| hird Party S | ervices | 841 | ble 🗌 | | | Address | Plot 91 Leaf Road | Forest Hildlew | | | | |
| | | Capita | ise 🗌 | | | Address | TownDurban Sou | 61234 | | | | |
| wts: | | Work Order It | m | | | Is Debtor | V | | | | | |
| | | Functional | Location () | Equipment | 0 | Customer Notes : | | _ | | | _ | |
| 2220 | _ | | 2.5.1 2.5.2 | 2200 | - | Notes | | NoteDate | NoteTime | FullName | | |
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| wap Outs | | | effectively | | | Existing third party Check toner yield | contract pending | 18 Apr 2016 04 Aug 2014 | 12:09:00 | Bianca Du Toit Belinda Sharman | | |
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| rs Windows * | | | | | | | | | | 17 May | 2010 | |



- 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 <u>View the Customer</u>.



My Work - View Customer Info and Customer Notes

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| Work Order | Contraction of the local division of the loc | 11 | | | | | | | | | | 1 | | | |
| iga tila | net Nexis | de/here | to drive he | thit close | | | | | | | | | | E. | / |
| WOCode | | | escription | | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | |
| | | | | | | | | | | | | | | | |
| W0000 | 001592 | RSI V | 1.27,0.0 -1 | ssue - Part Categ | Durban | М | DR | Default | PR,30000098 | Site Inspectino | PMNG | HOP001 | Hope Works | Technical | |
| 1 W000 | | | | dean required | Durban | 0 | REP | Machine Repairs | CN0000566 | Toner required | CALL | HOP001 | Hope Works | Technical | |
| | 001616 | | | uction batch - tes | | 0 | MN | Manufacturing | | | | | | | |
| E W0000 | | | ine service r in to be repa | | Durban Durban | 0 | SERV | Machine Repairs | | | | | | | |
| | 001663 | | | | | | | | | | | | | | |
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