

SERVICE

CALLS - LOG A CALL

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

Calls are primarily created when customers phone in for service related requirements.

Notes on Calls

- The **Call Listing** screen is used to log billable and non-billable **Service Calls** against contract and non-contract items, whether these are Assets or Locations.
- One or multiple <u>Work Orders</u> can exist within a call. Work Orders are likened to Job Cards or Work Instructions. <u>Work In Progress</u> transactions will be recorded against these work orders for the work that is required including Labour Time Booking, Parts, Expenses, Travel, Services and Sub Contract Work.
- Generally either an Asset or Location must be selected when logging the Call, and a Work Order is auto created when saving the Call. But this is dependant on your Company's system configuration. Refer to Specialized Call Configuration for more details about processing outside the standard processing.

1BPO2 v2.5.1.3 or higher



- <u>New Deal Sale</u> and <u>New Deal Rental</u> processing will also process through the call centre screen to enforce the Work In Progress transactions for installation of Sale or Rental Items.
- Calls are <u>Assigned</u> to employees (such as Technicians or Drivers) in order to perform the work required. An employee must be set as a <u>Technician</u> in order to be available for assignment. Refer to TechConnect for more information related to our mobile application that Technicians can use out in the field.
- Once work has been completed Work In Progress transactions can then be <u>Invoiced</u> if required, dependant on the scenario.

If the *Company*, *Contact*, or *Address* details for the customer have *changed*, then you can quickly update the details via the relevant *Ellipse* button in the call screen. Refer to Calls - Edit Buttons

You cannot log a call for a Customer on Hold. If you select a customer that is on hold, you will asked if you would like to log a <u>Call Request</u> instead.

An optional telephone number can be added to the call, which will be for your reference, when logging or editing the call. Refer to "Call Details" on page 4

CALL LOGGING - DETAIL SELECTION METHODS

- Call details can be selected based on what information is given when the client phones in.
- For example, if a call is logged for a serialised item and the serial number is known, this can be selected first. Associated header information will auto populate, which makes the call logging



process faster.

In this manual, we will first look at the standard call logging process, and then include a few tips for <u>other call detail selection</u> <u>methods</u>, such as first selecting the Serial Number or Location, Customer, Contact, or Telephone Number.

LOG A CALL

Ribbon Select Service > Calls



• The *Call Listing* screen will be displayed.

						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
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rmation	EE CN0001003	Young Electric	13/12/2022	Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
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In Progress	E CN0000995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
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O Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - C00000054	DR	Select Call Type					
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Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upprade			sin123		
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	Count: 386													

- The Calls are listed by *Site* and will display calls for the first Site listed.
- Click on the relevant *Site* for the calls you wish to view.



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Pretoria	E CN0000988	Young Electric	03/06/202	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
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Pending	E CN0000971	Westwood Dynamic	29/11/201	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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• Click on the *Add* button.



• The *Call maintenance* screen will be displayed.





CALL DETAILS

Customer: Search for and select the customer:

• The yellow colouring of the field indicates that you can search for the customer, using one of two methods.

Search Method 1:

- Type in a part of the Customer Name in the Customer field and press *Enter*.
- The example has "cafe" typed in the field. When pressing Enter, the system will locate all the Customers that has "cafe" as part of the name.
 - If the system locates the Customer, then the screen will be populated with the customer information.
 - If more than one Customer exists, then the Select a customer for this call screen will display a list of the Customer's that have "cafe" forming a part of the name.
 - Skip to Select Customer below



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- Click on the *search* button in the customer field.
- The *Select a customer for this call* screen will display, listing all Active Customers.
- Click on the *row* of the *customer* you wish to *log a call* for.
- Click on OK.



Select Customer:

- Click on the *row* of the *customer* you wish to *log a call* for.
- Click on OK.

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- The *Customer Info* docking panel will *expand* to display view only details for the selected customer. This is helpful for customer and credit status checks, as well as any prior call notes.
- When done, click anywhere outside this dock panel to hide it.



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Open Windows *			User - Rianza 31/05/2023 Version - 2.5.1.4 Evample Company

Contact: Search for and select the contact:

• The yellow colouring of the field indicates that you can search for the customer, using one of two methods.

Search Method 1:

- Type in a part of the Contact Name in the Contact field and press Enter.
- The example has "Tim" typed in the field. When pressing Enter, the system will locate all the Contacts that has "Tim" as part of the name.
 - If the system locates the Contact, then the field will be populated with the contact name.
 - If more than one Contact exists, then the Select a contact for this call screen will display a list of the Contact's that have "Tim" forming a part of the name.
 - Skip to Select Contact below.



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- Click on the search button in the contact field.
- The Select a contact for this call screen will display, listing all Active Contacts for the Customer previously selected.







- Click on the row of the contact you wish to link to the call.
- Click on OK.

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Open Windows *													User : Bianca 0	12/05/2023 Version : 2.5.1.4	Example Company

If you have searched for the contact person, and they do not appear on the list, then you can **add** a new contact from the **Call Maintenance** screen. This contact should be added as a **Standard Contact**. Refer to **Calls - Add** New Contact.

• **Contact No:** When the contact is selected, this field is auto populated with the contact's telephone number if configured on the contact.



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Home Equipme	ent / Locations Contract Finance / HR Inventory Mainto	nance / Projects Manufacturing Procurement Sales Service Reporting Utilities	- 8 ×
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	Status N-New		
	Optional No		
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• Address: Search for and select the address.

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		Cor	stact Tm	Matthews	P		Serial No								mer
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							4								
Meters															
Open Windows *														User : Bianca 02/06/2023 Version : 2.5.1.4 Ex	ample Company

• **Call Type:** Select the required call type from the drop down list. (Refer to **Static Data - Call Types** if the call type required has not yet been configured.)





- Error Code: Click on the down *arrow* to display the error code list.
- Select the *error code type* as quoted by the customer. This field is not a mandatory field and my not be set up, depending on system requirements. (Refer to Static Data - Call Error Codes for setting up error codes if not configured.)





- **Description:** Click in the text box to type in a description for the work required.
- **Call Date Time:** This field will display the current date and time by default, and should not be changed.
- **Priority¹:** Click in the field to type in or use the arrow indicators to select the call priority.
- **SLA:**² This field cannot be updated, as the service level agreement information will populate for the customer.
- Date Required: The date will default to the current date. Click to type in or use the down *arrow* to select an alternative date using the calendar function.
- Order No: Type in the Purchase Order number raised by the customer, if required.

Note that this field could be mandatory based on the customer contract configuration i.e. if it is specified in the contract to include the Order Number then this will become a mandatory field for that particular customer.

- Logged By: This field will be populated with the name of the person currently logging the call.
- Status: The call status field will be set to *N New* by default.
- **Optional No:** This field can be used for an additional reference number that the customer may wish to keep on record.

^{11 =} Most Important 5 = Least Important

²This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).



¢ •		Call maintenance - 8PO: Version 2.5.1.4 - Example Company	- Ø X
Home Equipment / Locations Contract	Finance / HR Inventory Maintenance / Projects Manufacturing Pro	ocurement Sales Service Reporting Utilities	- 8 ×
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Save Back Cose Complete Assign Hold Pen	ding Release Reinstate Save Layout Workspaces Print Note		
House Proven	Transler Dick Infe		
Harnam a riocess	a Print a Print a Print a		
Fotor text to reach P Customer Hope W	larks (Pty) Ltd , P + * ReferenceType Referen	notio	Earl
Contact Tm Ma	tthews ,0 Serial No		med
Functions Contact No. 039 123	14567 Cal Repuest Reference		Inte
Work Orders 0 Address Plot 91	Leaf Road D		
Forest I New To	Hills Location		
Durban	South - Oute Reference		100
Work In Progress Call Type Parts R	equirement • Invoice Reference		10
Error Code Faulty	Order Reference		2
Description Machine	e repair required 💦 *		1
Notes			5
	×		8
Call Date Time 02/06/2	2023 - 15:35:36 \$		ned.
Priority 3 ‡	• Prior Calls :		
SLA	CalReference CalDate Ca	afTime Description CalType CalTypeDesc ErrorCode ErrorCode Priority Action	DateRequired
Hold History Date Required 02/06/3	2023 -		
Order No 01234			
Logged By Blanca			
Pending History			
Ontineal Re 011000	week land		
Optimizing 031507	0041		
On Site Info 1			
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Time Review			
Description (
Processing			
Quotes			
	4		•
Meters			

RELATED REFERENCES

The **Related To** frame holds related references, such as the Serial Number or Location, originating Call Request Number, Contract Number, etc.

ð •			Call maintenance - BPO: Version 2.5.1.4 - Example Company	- 8 ×
Home Equips	ent / Locations Con	tract Finance / HR Inventory Mainto	niance /Projects Manufacturing Procurement Sales Service Reporting Utilities	_ 8 ×
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			Somat Pres Job	\$
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Functions	Contact	Tim Matthews ,0 *	Provide Reference	ert b
	Contact No.		California Reference	de la
Work Orders 0	Address	Plot 91 Leaf Road Porest Hills	Lordson	8
		New Town Durban South	Poper Reference	one
Work In Progress	Call Type	Parts Requirement		Info
	Error Code	Faulty +	Order Reference	8
	Description	Machine repair required		1
NOUS				User
	Call Date Time	0206/2023 * 16-36-36 *		Defin
Assignments	Priority	3.*		a
	SIA		Trior Lass : Califoréence Calibate Califore Description Califoreence Califoreence BronCode BronCode BronCode Description	DateRequired
March Martine	Date Required	02/06/2023 *		
Too Tably	Order No	01234		
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On Stellofo 1				
For Contract				
Time Review				
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- Consta-				
			4	
Meters				
Open Windows *			User : Bianca 02/06/2023 Version : 2.5	5.1.4 Example Company

For Standard call log processing, we will select either a <u>Serial Number</u> or <u>Loca-</u> <u>tion</u>.



Serial Number

- Click in the *Serial No.* field to display the *ellipsis* button.
- Click on the ellipsis button and select the serial number you wish to log the call against.
- Click on OK.

Note that as you have selected the customer first, the equipment list will be limited to the machines linked to the customer.



Meters

• If the asset has meters linked, then the Meters frame will automatically expand to display the Meter reading data grid.



() v							Call ma	aintenance -	BPO: Version	2.5.1.4 - Exampl	e Company					- 2 x
Hor	me Equipment /	Locations (ontract Fi	inance / HR I	Inventory	Maintenan	ce / Projects Mar	ufacturing	Procurement	Sales Serv	rice Reporting Utilities					_ & ×
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	arch P	Custom	er Hope Work	ks (Pty) Ltd	<i>.</i> م	• •	ReferenceType	Ref	erenceNo							upr
		Conta	ct Tim Matth	ews	, م		 Serial No 		32413546							nent
Functions		Contact I	o. 089 123 4				Call Request Refer	ence								Info
Work Order					0		Contract No									
Hore Group		Addre	55		,		Location									l g
							Project Reference									iomo
							Quote Reference									s In
Work In Pro	gress	Call Ty	Parts Requ	uirement		•••	Invoice Reference									5
		Error Co	le Faulty			•	Order Kererence									2
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Assignments		Call Date Tin	e 07/06/202	13 * 11:	21:29	:										User Defined
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		51	A 0.00				CalReference	CalDate	CallTime	Description		CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
And A Sector		Date Requir	d 07/06/202				CN0000983	09/06/2022	05:08:31	Test elapsed time	2 - day prior	TEST	Testing			SIN3 A
Hold History		Dute Require					CN0000981	21/11/2019	09:55:00	test placing call or	1 hold full set of topers required	ADM	Administration			SIN3.
		Order	lo				CN0000980	21/11/2019	12:16:47	Driver Connect -	office test	TON	Toner Required			SIN3
		Logged	Bianca				CN0000832	15/10/2019	15:05:26	it seems like call n	otes are not saving for call request	BUG	Software Bug			SIN3
Meters																-
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SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReadin	g PriorReading	Comments								
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▶ SIN32413546	5 Mono	Mono meter	07/06/2023	11:22:41		i (0.00 100.00									
Meters																
Open Windows													User : Bianca 07	7/06/2023 Ve	ersion : 2.5.1.4 Exa	mple Company

- Type in the meter reading(s), if required.
 - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that are yield controlled.
 - If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.
- You can also add a comment for each meter reading.
- When the meter reading has been updated, *hide* the frame by clicking outside the frame.



÷ ټ							Cal	ll maintena	nnce - B	BPO: Versio	2.5.1.4 - Example Company						- 8 x
Hor	ne Equipme	nt/Locations Co	intract F	inance / HR	Inventory	Maintenar	nce / Projects	Manufacturi	ing	Procurement	Sales Service Reportin	ng Utilities					_ & ×
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							Location										Dust
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Work areno	y cos	Can ryp	e Faits Key	urement			Order Referen	nue re									0
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Notes		Descriptio	n Machine n	epair required		•											5 08
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		51	0.00				CalReference	CalDat	te	CalTime	Description		CalType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
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Hold History		Date Require	d 07/06/20:	23 🔻			CN0000981	11/12/	2019	09:55:00	test placing call on hold		ADM	Administration			SIN3
		Order N	D				CN0000978		2019	11:07:42	Driver Connect - full set of toners	required	PR	Parts Requirement			SIN3
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I SIN3241354	i Mono	Mono meter 0	7/06/2023	11:22:41	-	4 15	0.00 100	.00 Readin	provid	ied by Tim wh	en call was logged	*					
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Open Windows *														User : Bianca 07	/06/2023 W	ersion : 2.5.1.4 Exa	mple Company

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Enter text to sea	ran)				,	÷. Þ	Serial No		SIN32413546							pmc
Functions		Conta	ict Tim Mat	thews	,p		Prior Call Referen	ce								136
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Meters																
Open Windows -			_							_			User : Bianca 0	7/06/2023 V	ersion : 2.5.1.4 Ex	ample Company
apart fillions													are then the	.,		in proceedings of the

- Type in the meter reading(s), if required.
 - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that are yield controlled.
 - If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.



- You can also add a comment for each meter reading.
- When the meter reading has been updated, *hide* the frame by clicking outside the frame.

						Call m	aintenance	- BPO: Versio	a 2.5.1.4 - Example Company					- P ×
Home Equip	ent / Locations O	ontract Fi	inance / HR	Inventory	Maintenan	nce / Projects Ma	nufacturing	Procurement	Sales Service Reporting Utilities					_ & ×
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Functions	Contact N	090 122 4				Prior Call Reference	e							C Inf
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Hold History	Date Require	a 07/06/202	3 •			CN0000981	11/12/2019	09:55:00	test placing call on hold	ADM	Administration			SIN3
	Order N	lo				CN0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SIN3
	Logged B	Bianca				CN0000980	21/11/2019	12:10:47	it seems like call notes are not saving for call request	BLC	Coffee Regured			SUN3.
Meters								. 10.00.20	The second		Continue and			4
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A 10: 10:	1 0 :	-	(0)	-	-	-	* 0 :							
I SIN32413546 Mono	Mono meter (07/06/2023	11:22:41	4	15	0.00 100.00	Reading prov	vided by Tim wh	en call was logged					
Onen Windows w		_	_	_	_		_	_		_	Liner - Bianca 07	1/06/2023 V	reinn - 2.5.1.4 Eva	mole Company

• Jump ahead to <u>Contract Number</u>.

Location

- Click in the *Location* field to display the *ellipsis* button.
- Click on the ellipsis button and select the Location you wish to log the call against.
- Click on OK.

Note that as you have selected the customer first, the location list will be limited to the locations linked to the customer.



ф v			Call maintenance - BPG					- 8 x
Home Equipm	ent / Locations Contract Finance / HR	Inventory Maintenance / P	rojects Manufacturing Pro	ocurement Sales	Service Reporting Utilities			_ & ×
Save Back	omplete Assign Hold Pending Release	Reinstate Save Layout Work	spaces Print Note					
Maintain 🦼								~
Links #		Relati	es To :					
Enter text to search P	Customer Hope Works (Pty) Ltd	,0 · · · + * Re	ferenceType Referen	nceNo				
Functions	Contact Tim Matthews	,0 * Pris	or Call Reference					ent
	Contact No. 089 123 4567	Cal	Request Reference					Info
Work Orders 0	Address Plot 91 Leaf Road	,0 ···	ntract No	-	Select the related location for this call			
			ation		Home			ustor
	Durban South	- 00	ote Reference					ner
Work In Progress	Call Type Scheduled Maintenance	e * Inv	oice Reference		Ok Back Save Lavout			Info
	Error Code Services	- Ore	der Reference					0
	Description Walls require regaintin			3	Process a Format a			
Notes	Description management	2						-
		· ·			FuncLocDescription	Category Class	Type	WOAttachm.
	Call Date Time 07/06/2023 •	10:18:22			* 10:	-D: -D:	-0:	i D:
Assignments	Priority 3 * *				Forest Hills Centre	DEDEDE DEDE	DE	No
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	SLA 0.00			arrine Descript	Jolly Farm Centre - First Floor	DEDEDE DEDE	DE	No
Hold History	Date Required 07/06/2023 *				Jolly Farm Centre - Second Floor	DEDEDE DEDE	DE	No
	Order No				Kloof Corner Mall	LCBUCS LCBU	LC	No
	Logged By Blanca				Kloof Corner Mall - First Floor	LCBUCS LCBU	LC	No
Pending History	Chatras N. Marri				Lilies Quarter Centre	DEDEDE DEDE	DE	No
	Status N-New				New Hope Mail- Unit 91, Leaf Road, New Town	LOBUCS LOBU	LC	No
	Optional No				Pine Willows Centre	DEDEDE DEDE	DE	No
On Site Info 1					Siver Birch Centre	DEDEDE DEDE	DE	No
					Watergreen Mall	LOBUCS LOBU	UC IC	No
					Water diess Mail	tables tabl	LC.	140
For Contract					·			'
		•						.
Meters						Liter / Rispers 07/05/2022	Marrian + 2 E 1 d	Example Company
Sport Hillions						User / Marica 07/06/2023	1.1.9011.2.0.1.9	company company

Contract Number

• If the Serial Number or Location you have selected is on contract, then the contract number field will auto populate with the contract number.

¢ ب							0	all maint	enance -	BPO: Version	a 2.5.1.4 - Example Company					_ 8 ×
Home	Equipment / Loca	tions Con	tract Finance	e/HR In	wentory	Mainten	ance / Projects	Manufac	turing:	Procurement	Sales Service Reporting Utilities					_ & ×
E Co Save Back	Close Complete	Assign Hol	d Pending R	Pr /	nstate	Save Layou	t Workspaces	Print	Note							
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	p	Customer	Hope Works (Pt	ty) Ltd	,o	+ *	ReferenceTy	pe	Ref	ierenceNo						
		Contact	Tim Matthews		Q		Serial No									
Functions		Contract No.					Prior Call Ref	erence								
		contact no.					Call Request	Keterence	200	000002						
Work Orders		Address	Plot 91 Leaf Roi Forest Hills	ad	,o		Location		For	est Hills Centre						
			Durban South				Project Refer	rence								
Week to December		Call Turne	Cobach and Maria	teopore			Quote Refere	ence								
work in Progres	⁸	Call Type	Scheduled Main	itenance			Order Defere	rence								
		Error Code	Services			-		1 NUC								5
Notes		Description	Walls require re	painting		* *										
	Cal	ll Date Time	07/06/2023	• 10:1	4:52	÷										
Assignments		Priority	3 🙏 *				- Drive Calles -									
							CalReference	e (Ca	Date	CalTime	Description	CalType	CalTypeDesc	FrrorCode	FrrorCodeDesc	Priority
	_	SLA					► CN0000969	16	(11/2019	08:00:00	Check lighting system and fixtures	INST	Installation	Entreteose	CITO CONCOCIO	A
Hold History	Da	te Required	07/06/2023	*			CN0000961	18	(10/2019	08:00:00	Bathroom deaning	INST	Installation			
		Order No					CN0000955	18	09/2019	08:00:00	Trash removal	INST	Installation			
							CN0000947	17	08/2019	08:00:00	Inspecting door and window alarm systems to ensure proper ope.	. INST	Installation			
A sector states		Logged By					CN0000941	18	07/2019	08:00:00	Servicing fire alarms and fire suppression systems	INST	Installation			
Pending History		Status					CN0000933	18,	06/2019	08:00:00	Replacing HVAC air filters.	INST	Installation			
		0-1-11-					CN0000928	18,	05/2019	08:00:00	Inspecting ceilings and floors for water damage during winters.	INST	Installation			
		Optional No					CN0000919	18,	04/2019	08:00:00	Sealing cracks in parking lots.	INST	Installation			
On Site Info	1						CN0000914	19,	03/2019	08:00:00	Cleaning outdoor spaces.	INST	Installation			
							CN0000906	19	02/2019	08:00:00	Clearing gutters and drainages.	INST	Installation			
							CN0000901	18,	01/2019	08:00:00	Inspecting outdoor lighting for damage.	INST	Installation			
							CN0000892	18,	12/2018	08:00:00	Landscaping such as mowing tawns and trimming shrubs.	INST	Installation			
For Contract							CN0000887		11/2018	08:00:00	Ensure all water connections and drainage works properly	INST	Installation			
							CN0000878	18,	10/2018	08:00:00	Check inventory and restock first aid kits	INST	Installation			
							CN0000873	18	m972018	108:00:00	Insect all electrical equipment	INST	Installation			
Meters																
Open Windows -													User : Bianca	07/06/2023 W	ersion : 2.5.1.4 Exa	mple Company

The Call maintain screen has a lot of helpful information that can be viewed when logging the call or after the call has been saved.



You can skip ahead to <u>Adding the Call Note</u> or <u>Saving the Call</u>.

EQUIPMENT INFO

The Equipment Information dock panel will only contain information where a *Serial Number* is linked to the call, as this information is related to the associated part number.

• Click on the Equipment Info tab.

🗇 👻				Call maintenanc	e : Call ref Cl	10001006 - E	3PO: Version 2.5.1.4 - Example Company					_ & ×
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Enter text to search P	Customer	Hope Works (Pty) Ltd	* ۰۰۰ ج	ReferenceType	Ref	erenceNo						Usto
	Contact	Tim Matthews	• و	Serial No	SIN	32413546						mer
Functions				Prior Call Referen	ice							Info
	Contact No.			Call Request Refi	erence							0
Work Orders 1	Address		· ··· 9	Contract No								2
				Location								6
				Project Reference								c
Work to Departure	Call Type	Parte Page irament		Quote Reference								8
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	Error Code	Faulty	*									a a a a a a a a a a a a a a a a a a a
	Description	Machine repair required	. •									
Notes												2
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	Call Date Time	07/06/2023 • 1	1:21:29 📮									nfo
Assignments	Priority	3 🌲 •		Prior Calls :								
	61.6			CalReference	CalDate	CalTime	Description	CalType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
	504			CN0001006	07/06/2023	11:21:29	Machine repair required	PR	Parts Requirement	FA	Faulty	SIN3 A
Hold History	Date Required	07/06/2023 💌		CN0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN3
	Order No			CN0000981	11/12/2019	09:55:00	test placing call on hold	ADM	Administration			SIN3
				CN0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SIN3
	Logged By			CN0000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SIN3
	Status			CN0000832	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SIN3
				CN0000819	17/05/2019	13:38:48	Test auto scheduling is No	BUG	Software Bug			SIN3
	Optional No			CN0000816	14/05/2019	13:51:04	Create a call for invoicing and attempt to credit against a dosed	ADM	Administration			SIN3
On Site Info 1				CN0000808	10/01/2019	13:44:52	Contract SLA setup checks	SW	Software			SIN3.
				CN0000797	18/09/2018	16:28:30	Test call for back order report	INST	Installation			SIN3
				CN0000791	06/09/2018	16:44:03	Work order to test reopening purchase orders	INSP	Inspection			SIN3
				CN0000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SINS
For Contract				CN0000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST.	Installation			5043
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Ones Wedawa a									University of			and Comments
Open minuons *									use volanca 07	roorzo23 Ve	196011-2-0/1-4 EX8	ample company

- The Equipment Info dock panel will open, displaying useful information related to the *serial number* and its *part number*:
 - Part No, Part Description, Model Number, Category, Duty Cycle and Life Cycle information related to the Part Number.
 - Warranties will list any warranties assigned to the Serial Number.
 - Purchase Orders ?



Calls - Log a Call

ф т					Call maintena	ance : Call	ref Cl	10001006 - E	8PO: Version 2.5.1.4	4 - Examp	le Company						80
Home Equip	oment / Locations Co	ntract Finance / I	R Inventor	Mainter	nance / Projects	Manufact	turing	Procurement	t Sales Servi	ice Rep	porting Utilities						8 3
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Enter text to search >				-	 Serial No 		SIN	32413546			Part No	1458-96523					
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					Location						Category	Kyocera Multifunctional Copier	s 🗠				
					Project Refere	ence											
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					CN0000791	06/0	09/2018	16:44:03	Work order to test	t reopening	1						
					CN0000763	06/0	07/2018	13:29:02	Test call for auto in	nvoice proc	e						
For Contract					CN0000560	01/0	02/2018	13:23:17	Test logging a call	- listing sho	4						
					CN0000558	29/0	01/2018	11:49:10	Test call list refres	hing after s	2						
					CN0000433	03/0	14/2017	16:22:48	Swap out								
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Meters																	
Open Windows *													User : Bianca	07/06/2023	Version: 2.5	1.4 Example	é Compan

SLAs

If the Item is on contract any SLA Contract Inclusion Items will display in this list.

• Click on the SLAs tab.

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	Contact	Tim Matthews	0.		Serial No		SIN3241354							ome
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					CN0000763	06/07/2	018 13:29:	2 Test call for auto invoice	e processing	INSP	Inspection			SIN3
For Contract					CN0000560	01/02/2	018 13:23:	7 Test logging a call - listin	ng should auto refresh	INST	Installation			SIN3
					CN0000558	29/01/2	018 11:49:	0 Test call list refreshing a	after saving a new call.	π	IT Requirement			SIN3
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Open Windows *											User : Bianca 08	1/06/2023 Ve	ersion : 2.5.1.4 Exa	ample Company



• The SLAs dock panel will open displaying the SLA Items as well as the quantity included.

For Labour Time, you will be able to see how many hours are included versus how many hours have been used. If Time Review is used, you can also see time logged that has not yet been reviewed as under SLA.



- Click on the expand data grid button to view the SLA Item Details
- This will show you a record of the items logged under SLA



Calls - Log a Call

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Notes Assignments Hold Hatary Pending Hatary On Site Sinfo 1 For Createst	Call Date Time Priority SLA Date Required Order No Logged By Status Optional No	07/06/2023	11:21:29	•	Prior Calls : CallReference ► CN0001006 CN0000983 CN0000983 CN0000981 CN0000812 CN0000812 CN0000815 CN0000815 CN0000783 CN0000783	CalDate 07/06/2023 11/12/2019 21/11/2019 21/11/2019 15/10/2019 11/05/2019 10/01/2019 10/07/2018 06/09/2018 06/09/2018	CalTime 11:21:29 06:08:31 09:55:00 11:07:42 12:16:47 13:50:26 13:38:48 13:51:62 13:44:52 16:28:30 15:44:03 13:29:27	Description Middhine repair require test placing call on hidd Dhine Correct - Jallie Theme Correct - office It seems like call hote's erst auto schedung is Create a call for mixed Contract 3.4 setup dhe Trest call for babc offer Trest call for babc offer Trest call for babc offer Trest call for ablo more Trest logging a call - lais									
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Acagoments Acagoments Held Hetory Pending Hatary Ch Site Info 1 For Contract	Call Date Time Priority SLA Date Required Order No Logged By Status Optional No	07/04/2023	11:21:29	•	Prior Calls : Calledrence ↓ CN0001006 CN0000983 CN0000983 CN0000981 CN0000819 CN0000819 CN0000815 CN0000797 CN0000793 CN000000 CN000793 CN0000000 CN0000000 CN00	CalDate 07/06/2023 09/06/2022 11/12/2019 21/11/2019 12/15/2019 13/10/2019 13/10/2019 10/01/2019 10/01/2019 06/07/2018 05/07/2018 01/02/2018	CalTime 11:21:29 06:08:31 09:55:00 11:07:42 12:16:47 15:05:26 13:38:48 13:51:04 13:38:48 13:51:04 13:44:52 16:28:30 15:44:03 15:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 13:29:12 14:29:12 14:29:12 15:2	Description Midchine repair requirer test plang and an hald Dhirer Correct - fulls there correct - office it seems like call notes - test auto schedung is Crosta e call for motion Contract SLA setup dhe Test call for bab croler Test call for bab croler Test call for bab croler Test call for abla more Test call for abla more test logging a call - list Test call lat refielding. Sean nit	d a a t t t t t t t t t t t t t t t t t								

User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

Π

- Click on the **User Defined** dock panel tab to open the panel.
- Any custom fields configured and updated for the related *Cus*tomer, Asset or Location and /or Contract linked to this call will display in the User Defined field panel.

¹ BPO2 v2.5.0.8 or higher. "Add Interest Rate " on page 2



Add Call Note

• A Call Note can be added directly from the Call Maintain screen by clicking on *Note*.

ф т			Call n	aintenance -	BPO: Version	a 2.5.1.4 - Example Company					- (2) ×)
Home Equipment / Lo	cations Cont	ract Finance / HR Inventory Mainte	nance / Projects Ma	nufacturing	Procurement	Sales Service Reporting Utilities					_ & ×
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	Contact	Tim Matthews , *	Serial No		32413546						neri
Functions	Contact No.		Prior Call Referen	e							Inf
	contact not		Contract No.	rence							L.
Work Orders 0	Address	· ··· 9	Location								8
			Project Reference								torr
			Quote Reference								8
Work In Progress	Call Type	Parts Requirement 👻 *	Invoice Reference								nfo
	Frror Code	Faulty	Order Reference								0
											UAs
Notes	Description	Machine repair required									User Def
	Call Date Time	07/06/2023 • 11:21:29 ÷									ned
Assignments	Priority	3 🔹 *	Prior Calls :								
	SLA		CalReference	CalDate	CallTime	Description	CallType	CalTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
	564		CN0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN3 +
Hold History	Date Required	07/06/2023 -	CN0000981	11/12/2019	09:55:00	test placing call on hold	ADM	Administration			SIN3
	Order No		CN0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SIN3
			CN0000980	21/11/2019	12:16:47	Driver Connect - offine test	TON	Toner Required			SIN3
Pending History	rogged by		CN0000832	15/10/2019	15:05:26	It seems like call notes are not saving for call request	BUG	Software Bug			SUN3
	Status		CN0000819	1//05/2019	13:38:48	Test auto scheduling is No	BUG	Software Bug			SIN3
	Ontional No.		CN0000818	19/03/2019	12:44:52	Contract SLA columnities of the columnitie	CIM	Coffuero			CTN 2
			CN0000797	18/09/2018	16.28.30	Tast call for back order report	INST	Iostalation			SIN3
On Site Info 1			CN0000791	06/09/2018	16:44:03	Work order to test reopening purchase orders	INSP	Inspection			SIN3
			CN0000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SIN3
			CN0000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SIN3
For Contract			CN0000558	29/01/2018	11:49:10	Test call list refreshing after saving a new call.	Π	IT Requirement			SIN3
			CN0000433	03/04/2017	16:22:48	Swap out	SERV	Service			SIN3
			CN0000400	07/02/2017	21:10:32	BPO2 nart list	RFP	Renair	P1	Paner Tam	SIN3
Meters											
Open Windows 🕶								User : Bianca 07	/06/2023 Ve	rsion : 2.5.1.4 Exa	mple Company

- The *New Note* frame will be displayed.
- Click in the text area to type the customer note and click on *Close* when done.
- The Note will be saved as a Call Note when the call is saved.



ф т						Ca	ll maintenar	ice - BPO): Version	2.5.1.4 - Example Com	ipany						- P X
Home	Equipment / Location	is Cont	tract Finance / HF	Inventor	/ Mainten	ance / Projects	Manufacturin	g Pro	ocurement	Sales Service	Reporting Utilities						_ & ×
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		Contact	Tim Matthews	2		Serial No		SIN3241	13546			New Note	quested a loan	unit while their unit in	being repaired		men
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	Cor	ntact no.				Call Request R	eterence										0
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Work In Progress	. (Call Type	Parts Requirement		* *	Invoice Refere	nce										fo
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	_	SLA				► CN0000983	09/06/2	022 06	:08:31	Test elapsed time 2 - day	y prior		TEST	Testing	Entropole	Life Course	SIN3 +
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						CN0000980	21/11/2	019 12	16:47	Driver Connect - offline t	test		TON	Toner Required			SIN3
Dan dan Matan	Lo	ogged By				CN0000832	15/10/2	019 15	:05:26	it seems like call notes an	re not saving for call reque	est	BUG	Software Bug			SIN3
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						CN0000763	06/07/2	018 13	:29:02	Test call for auto invoice	nocessing		INSP	Inspection			SIN3
						CN0000560		018 13	:23:17	Test logging a call - listing	o should auto refresh		INST	Installation			SIN3
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						CN0000433	03/04/2	017 16	:22:48	Swap out			SERV	Service			SIN3
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Open Windows 🕶														User : Bianca 03	7/06/2023 Ve	rsion: 2.5.1.4 Exa	mple Company

• Refer to Calls - Notes to view a list of all the notes created for the Call.

SAVE THE CALL

• When you are done, click on *Save*.

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					CN0000978	21/	11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SIN3
	Order No				CN0000980		11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SIN3
	Logged By				CN0000832		10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SIN3
	Ch -				CN0000819	17/	05/2019	13:38:48	Test auto scheduling is No	BUG	Software Bug			SIN3
	Status				CN0000816	14/	05/2019	13:51:04	Create a call for invoicing and attempt to credit against a closed .	. ADM	Administration			SIN3
	Optional No				CN0000808	10/1	01/2019	13:44:52	Contract SLA setup checks	SW	Software			SIN3
					CN0000797	18/	09/2018	16:28:30	Test call for back order report	INST	Installation			SIN3
On site Info 1					CN0000791	06/	09/2018	16:44:03	Work order to test reopening purchase orders	INSP	Inspection			SIN3
					CN0000763	06/0	07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SIN3
					CN0000560	01/0	02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SIN3
For Contract					CN0000558	29/	01/2018	11:49:10	Test call list refreshing after saving a new call.	Π	IT Requirement			SIN3
					CN0000433	03/0	04/2017	16:22:48	Swap out	SERV	Service			SIN3
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Open Windows 🔻											User : Bianca 07	/06/2023 Ve	ersion: 2.5.1.4 Exa	mple Company



- You will return to the *Call Listing* screen where you can *view* the new *call log*.
- If the new call log is not immediately apparent in the Call Listing screen, then click on *Refresh*.

¢.						Call Listing - E	PO: Version 2	.5.1.4 - Example Company				- 8
-	Home Equipment / L	ocations Contract	Finance / HR Inventor	ry Maintenance	/ Projects	Manufacturing	Procuremen	it Sales Service Reporting Utilities				- 2
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- 0	Durban	► E CN0001006	Hope Works (Pty) Ltd	07/05/2023	UnAssigned		11:21:29	Machine repair required	PR	Parts Requirement	FA	Faulty
	New	E CN0001005	Hope Works (Pty) Ltd	07/06/2023	UnAssigned		10:14:52	Walls require repainting	SM	Scheduled Maintenance	SERV	Services
	In Progress	E CN0001003	Young Electric	13/12/2022	Awaiting Ac	. Arin Milton	10:09:10	Test account balances	CR	Change Request		
	() Hold	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Ac	. Mary Thom	16:18:30	Test call for account balances manual.	DR	Select Call Type		
	Pending		Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	OR	Change Request		
	Complete	E CN0000996	Hope Works (Pty) Ltd		UnAssigned			ForRentalContract	NDR	New Deal Rental		
	🖸 All	E CN0000992	Top Vehicle Hire		Awaiting Ac	. Daniel Balgo	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service		
🖸	Pretoria		Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Call Type		
	New New	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing		
	In Progress	E CN0000988	Young Electric	03/06/2022	UnAssigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration
	Hold	E CN0000987	Young Electric	06/06/2022	UnAssigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade		
	Penaing Complete	CN0000986	Young Electric		UnAssigned		06:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type		
- 2		E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade		
- 🗖	Cape Town		Hope Works (Pty) Ltd	08/06/2022	UnAssigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing		
	New New	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing		
	In Progress		Young Electric	10/06/2022	UnAssigned		06:00:35	Test elapsed hours 1	TEST	Testing		
	() Hold		Young Electric	19/11/2019	Awaiting Ac	Bianca Du T	11:24:39	Test with site manager email entered	ADM	Administration		
	Pending	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Ac	. Bianca Du T	16:30:20	test another call email	ADM	Administration		
	Complete	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Ac	. Bianca Du T	15:57:00	Test new call for email description in body	CR	Change Request		
	🖸 All	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
- 🖸	Bloemfontein	E CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
	New New	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		08:00:00	Check lighting system and fixtures	INST	Installation		
	In Progress	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance		
	Hold	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
	Canalaka	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
	O Al											
		Count: 38	38									
Open Wind	lows 🔻									User : Bianca 07/06/2023	Version : 2.5.1	.4 Example Compa

VIEW WORK ORDER DETAILS

For standard call centre processing, the underlying Work Order is automatically created.

- From the *Call Listing* screen,
- Click on the *expand button [+]* in the row of the *call log* you wish to view the *work order details* for.
- The *Work Order data grid* will expand to display the generated *work order number* and all the information related to the call log.



Image: Second Jack Seco	Home Environment / I or		Finance / HD Inventory		(Projecte N	all Listing - Bi	O: Version 2	.5.1.4 - Example	Company	V Reporting								- 8
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You can also view the call work order(s) from the call maintain screen.

ADDITIONAL DETAIL SELECTION METHODS

As noted in the introduction text, using these detail selection methods can help speed up the call logging process.

LOG CALL FROM THE SERIAL NUMBER OR LOCATION

- In the *Relates To* frame, select either the *Serial No.* or the *Location*.
- The associated Customer and Customer details will auto populate, and if the item selected is on Contract, the Contract Number will also auto populate.

FIND CUSTOMER BY TEL NO

Alternatively, search for the customer by *Telephone Number*.



Note that the telephone number saved on the customer record, and the number you are searching for should not have any spaces.

- From the *Call maintenance* screen,
- Click on the *Customer Info* tab.

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- In the Tel No field, type in the telephone number and press enter on your keyboard.
 - If the number matches a telephone number on a single Customer, the customer details will populate.
 - If a few customers have the same telephone number, a lookup will list display that you can select from.



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• The associated Customer and Customer details will auto populate.

Related Topics

- Introduction to Work Orders
- Calls Add New Contact
- Calls Edit Buttons
- Calls Customers on Hold

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