

SERVICE

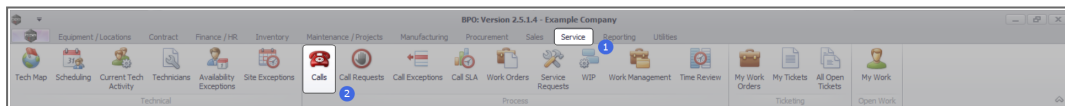
CALLS – EDIT A CALL

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 [Call Centre Mode](#) notes.

You may need to **edit** a call, if the main detail, such as the *Call Description*, is incorrect. The call needs to be **saved** after editing.

A call can be edited in order to view the selected call details and to log call information, such as, book technician time, log part and service requests, raise invoices, etc.

Ribbon Select *Service > Calls*



- The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	00:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Sawmills Owner	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Order for a new printer	CR	Change Request			AT300000		3
IB CH0000992	Top Value Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT300000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	13/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2022 Version : 2.5.1.4 Example Company

- 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.

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	00:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Sawmills Owner	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Order for a new printer	CR	Change Request			AT300000		3
IB CH0000992	Top Value Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT300000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	13/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilsonst	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

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- Select the **Call** you wish to work with.

Call Listing - BPO Version 2.5.1.4 - Example Company

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

My Call Add Edit Refresh Save Layout Workspaces My Call Save Filter Start Close Complete Hold Pending Follows Print Reports

Find Filter

Drop a column header here to group by that column

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Ash Hilborn	09:09:10	Test account balance	CR	Change Request			107		3
BI CH0001002	Sawmills Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balance manual	SR	Select Call Type			SR-12/12/22		3
BI CH0001001	Young Electric	26/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BI CH0000998	Top Value Hire	25/10/2022	Unassigned		14:08:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
BI CH0000991	Apple Juice Inc	24/09/2022	Unassigned		09:36:15	Contact Closure - C0000055	SR	Select Call Type					3
BI CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	01/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		05:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765		3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SR02413546		3
BI CH0000982	Young Electric	18/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095013015		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095013015		3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
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BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
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BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 306

User: Bianca 30/03/2023 Version: 2.5.1.4 Example Company

- Click on the **Edit** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

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

My Call Add Edit Refresh Save Layout Workspaces My Call Save Filter Start Close Complete Hold Pending Follows Print Reports

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BI CH0001001	Young Electric	26/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
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BI CH0000988	Young Electric	01/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
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BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		05:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765		3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SR02413546		3
BI CH0000982	Young Electric	18/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095013015		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095013015		3
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BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
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BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
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BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
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BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 306

User: Bianca 30/03/2023 Version: 2.5.1.4 Example Company

- The **Call maintenance: Call ref. - [call ref number]** screen will be displayed.

Call maintenance : Call ref. - CH0001006 - BPO: Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reallocate Save Layout Workspaces Print Note

Links Enter text to search...

Functions

- Work Orders 2
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info 1
- For Contract

Customer: **Open World (Pty) Ltd**

Contact: **Tim Matthews**

Contact No: 089 123 4567

Address

Call Type: Parts Requirement

Error Code: Faulty

Description: Machine repair required

Call Date Time: 07/06/2023 11:21:29

Priority: 3

SLA

Date Required: 07/06/2023

Order No

Logged By: Bianca

Status: N - New

Optional No

Relates To

ReferenceType	ReferenceNo
Serial No	SN32413546
Prior Call Reference	
Call Request Reference	
Contract No	CO0000049
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0001006	07/06/2023	11:21:29	Machine repair required	PR	Parts Requirement	FA	Faulty	SN32413546
CH000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	DR	Select Call Type			SN32413546
CH000981	11/12/2019	09:55:00	Test placing call on hold	ADM	Administration			SN32413546
CH000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SN32413546
CH000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SN32413546
CH000832	15/10/2019	15:05:26	It seems like call notes are not saving for call request	DR	Select Call Type			SN32413546
CH000819	17/05/2019	13:38:48	Test auto scheduling is no	DR	Select Call Type			SN32413546
CH000816	14/05/2019	13:51:04	Create a call for invoicing and attempt to credit against a closed	ADM	Administration			SN32413546
CH000808	10/01/2019	13:44:52	Contract SLA setup checks	DR	Select Call Type			SN32413546
CH000797	18/09/2018	16:28:30	Test call for back order report	INST	Installation			SN32413546
CH000791	06/09/2018	16:44:03	Work order to test reopening purchase orders	INSP	Inspection			SN32413546
CH000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SN32413546
CH000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SN32413546
CH000558	29/01/2018	11:49:10	Test call list refreshing after saving a new call.	IT	IT Requirement			SN32413546
CH000413	03/04/2017	16:27:48	Run out	SRV	Service			SN32413546

Meters

Open Windows

User : Bianca 05/07/2023 Version : 2.5.1.4 Example Company

CALL DETAILS

- Update the Call Details as required. Note that when **Editing** only certain fields can be updated.

Call maintenance : Call ref. - CH0001006 - BPO: Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reallocate Save Layout Workspaces Print Note

Links Enter text to search...

Functions

- Work Orders 2
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info 1
- For Contract

Customer: **Open World (Pty) Ltd**

Contact: **Tim Matthews**

Contact No: 089 123 4567

Address

Call Type: Parts Requirement

Error Code: Faulty

Description: Machine repair required

Call Date Time: 07/06/2023 11:21:29

Priority: 3

SLA

Date Required: 07/06/2023

Order No

Logged By: Bianca

Status: N - New

Optional No

Relates To

ReferenceType	ReferenceNo
Serial No	SN32413546
Prior Call Reference	
Call Request Reference	
Contract No	CO0000049
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0001006	07/06/2023	11:21:29	Machine repair required	PR	Parts Requirement	FA	Faulty	SN32413546
CH000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	DR	Select Call Type			SN32413546
CH000981	11/12/2019	09:55:00	Test placing call on hold	ADM	Administration			SN32413546
CH000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SN32413546
CH000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SN32413546
CH000832	15/10/2019	15:05:26	It seems like call notes are not saving for call request	DR	Select Call Type			SN32413546
CH000819	17/05/2019	13:38:48	Test auto scheduling is no	DR	Select Call Type			SN32413546
CH000816	14/05/2019	13:51:04	Create a call for invoicing and attempt to credit against a closed	ADM	Administration			SN32413546
CH000808	10/01/2019	13:44:52	Contract SLA setup checks	DR	Select Call Type			SN32413546
CH000797	18/09/2018	16:28:30	Test call for back order report	INST	Installation			SN32413546
CH000791	06/09/2018	16:44:03	Work order to test reopening purchase orders	INSP	Inspection			SN32413546
CH000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SN32413546
CH000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SN32413546
CH000558	29/01/2018	11:49:10	Test call list refreshing after saving a new call.	IT	IT Requirement			SN32413546
CH000413	03/04/2017	16:27:48	Run out	SRV	Service			SN32413546

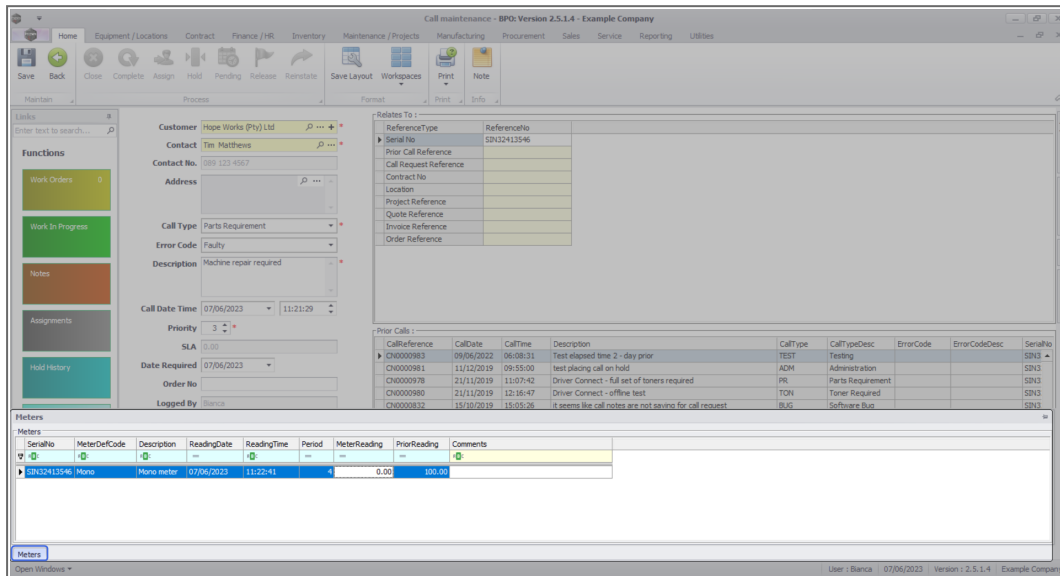
Meters

Open Windows

User : Bianca 05/07/2023 Version : 2.5.1.4 Example Company

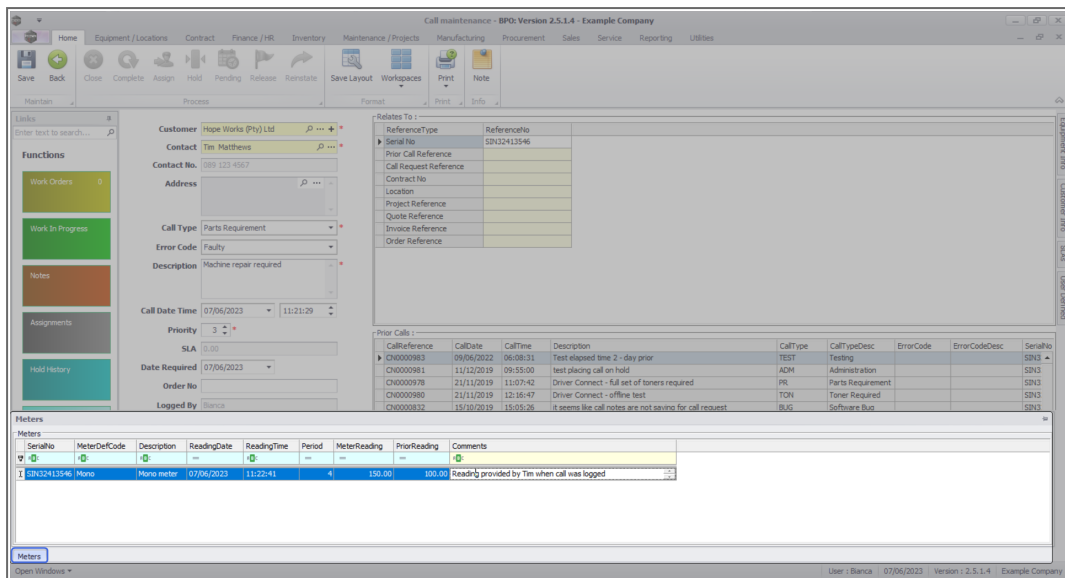
CALL METER READING

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



The screenshot shows the 'Edit a Call' form in the CO3 Technologies software. The 'Meters' frame is expanded at the bottom, displaying a table of meter readings. The table has the following columns: SerialNo, MeterDefCode, Description, ReadingDate, ReadingTime, Period, MeterReading, PriorReading, and Comments. The data row shows a meter with SerialNo 'SN12413546', MeterDefCode 'Moro meter', ReadingDate '07/06/2023', ReadingTime '11:20:41', Period '4', MeterReading '0.00', and PriorReading '100.00'.

- 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 maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: Hope Works (Pty) Ltd
Contact: Tim Matthews
Contact No: 089 123 4567
Address: [Empty]
Call Type: Parts Requirement
Error Code: Faulty
Description: Machine repair required
Call Date Time: 07/06/2023 11:21:29
Priority: 3
Date Required: 07/06/2023
Order No: [Empty]
Logged By: Bianca

Relates To:

ReferenceType	ReferenceNo
Serial No	SNJ2413546
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

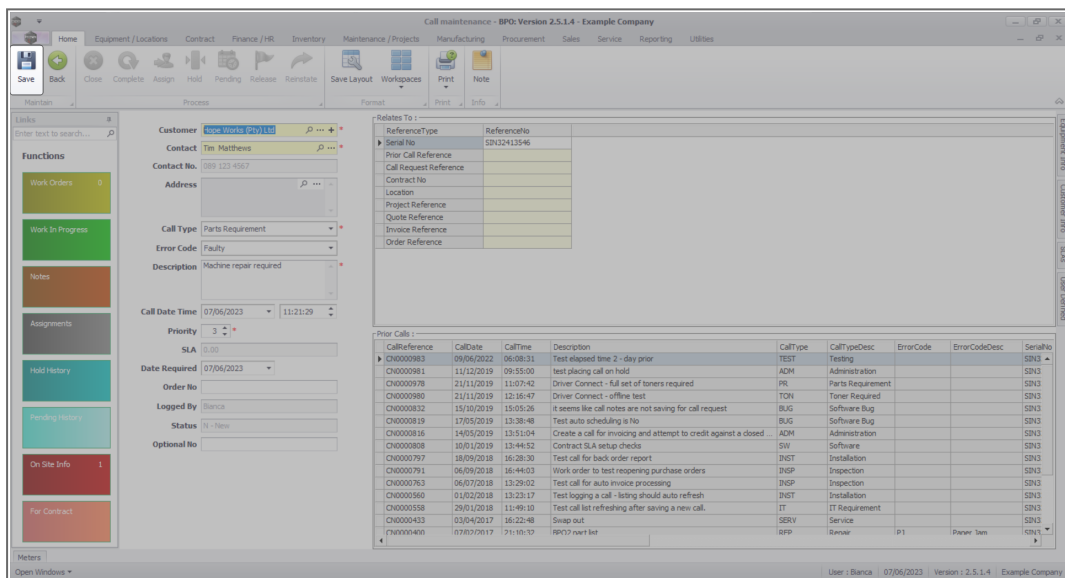
Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SNJ2413546
CH0000981	11/12/2019	09:55:00	Test placing call on hold	ADM	Administration			SNJ2413546
CH0000978	21/11/2019	11:07:42	Driver Connect - Full set of toners required	PR	Parts Requirement			SNJ2413546
CH0000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SNJ2413546
CH0000982	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SNJ2413546

Meters:

SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReading	PriorReading	Comments
SNJ2413546	Mono	Mono meter	07/06/2023	11:22:41	4	150.00	100.00	Reading provided by Tim when call was logged

- When you are done, click on **Save**.



Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: Hope Works (Pty) Ltd
Contact: Tim Matthews
Contact No: 089 123 4567
Address: [Empty]
Call Type: Parts Requirement
Error Code: Faulty
Description: Machine repair required
Call Date Time: 07/06/2023 11:21:29
Priority: 3
Date Required: 07/06/2023
Order No: [Empty]
Logged By: Bianca
Status: N - New
Optional No: [Empty]

Relates To:

ReferenceType	ReferenceNo
Serial No	SNJ2413546
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SNJ2413546
CH0000981	11/12/2019	09:55:00	Test placing call on hold	ADM	Administration			SNJ2413546
CH0000978	21/11/2019	11:07:42	Driver Connect - Full set of toners required	PR	Parts Requirement			SNJ2413546
CH0000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SNJ2413546
CH0000982	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SNJ2413546
CH0000919	17/05/2019	13:38:48	Test auto scheduling is no	BUG	Software Bug			SNJ2413546
CH0000916	14/05/2019	13:51:04	Create a call for invoicing and attempt to credit against a closed	ADM	Administration			SNJ2413546
CH0000908	10/01/2019	13:44:52	Contract SLA setup checks	SW	Software			SNJ2413546
CH0000797	18/09/2018	16:28:30	Test call for back order report	INST	Installation			SNJ2413546
CH0000791	06/09/2018	16:44:03	Work order to test resending purchase orders	INSP	Inspection			SNJ2413546
CH0000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SNJ2413546
CH0000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SNJ2413546
CH0000558	29/01/2018	11:49:10	Test call list refreshing after saving a new call	IT	IT Requirement			SNJ2413546
CH0000433	03/04/2017	16:22:48	Swap out	SERV	Service			SNJ2413546
CH0000400	07/03/2017	21:10:12	RPTD next list	SERV	Service	P1	Power Item	SNJ2413546

Meters:

SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReading	PriorReading	Comments
SNJ2413546	Mono	Mono meter	07/06/2023	11:22:41	4	150.00	100.00	Reading provided by Tim when call was logged

Related References

- [Introduction to Work Orders](#)
- [Add a Call](#)
- [Calls - Edit Buttons](#)

MNU.122.002