

SERVICE

CALLS - CLOSE 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.

A call that has been closed, can <u>only</u> be viewed in the **All** status.

A Call can be <u>re-instated</u> after it has been closed.

If you need to process something on a work order linked to a closed call, e.g. raise a Credit Note, then the work order will need to be <u>re-instated</u>. The work order can then be close again.

The system will notify you of any outstanding items, e.g. billable items not yet invoiced, for the call. You will have to act on the relevant messages before the call can be closed.

Ribbon Select Service > Calls



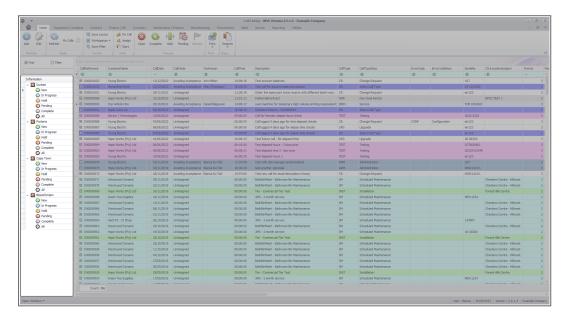
• The *Call Listing* screen will be displayed.

1BPO2 v2.5.1.3 or higher



d Edit Refresh My Calls	🔏 Save Pilb	r Lasign Close		-		s								
taintain J State	. Format	Work	Proce	55	a Print a Repo	4								
Find O Filter	CalReference	CustomerName	CalDate	CalState	Terbrician	CalTime	Description	CalType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SeriaNo	CtriLocationSubject	Priprity
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nformation	EE CN0001003	Young Bectric	13/12/2022	Awaiting Acceptance		10:09:10	Test account balances	CR	Change Request		-w-	107	w	
Durban	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Cal Type			19-12/1202		-
New New York New Y	E CN0001001	Young Electric	29/11/2022	UnAssigned	nary monpoor	11:29:19	Order the same part twice receive with different batch num		Change Request			19-12/1202 10123		
In Progress		Hope Works (Ptv) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental			80123	BPO2 TEST 1	
🕗 Hold	E CN0000995												BPUZ IEDI 1	
Pending	 E CN0000992 E CN0000991 	Top Vehicle Hire Apple Juice Inc	25/10/2022	Awaiting Acceptance	Daniel balgowen	14:09:17	Loan machine for temporary high volume printing requirement Contract Closure - COC000054	SERV DR	Service Select Cal Type		-	T0P12340LD		
Complete														
_ O AI	E CN0000989	Derton / Technologies	13/06/2022			09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria New	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 In Process 	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
(i) Hold	CN0000985	Young Electric	07/06/2022			05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
Pending	EE CN0000985	Hope Works (Pty) Ltd	10/06/2022			16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O AI	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	EE CN0000982	Young Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
New New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance		11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Anaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
🕓 Hold	E CN0000972	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			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
_ O AI	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
o tioenfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	514	Scheduled Maintenance			NEW 1234		
O New	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
 In Progress Hold 	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
Q Al	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	SathSinNaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
•	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	SathSinNaint - Bathroom Sin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hils Centre	
	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		08:00:00	29/5 - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	E 0400034	ureen rea supplies	17/09/2019	Crives great		00100100	246 - 2 monut service	014	suled to Marketance			Contract T		
	Count: 38													

- 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.



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



Add Edit Refresh My Call	Save Lay Workapa Workapa Save Pilb Format		Complete H	ki Pending Release	Print Report									
@ Find O Filter	CalReference	CustomerName	CalDate	Calistate	Technician	CalTime	Description	CalType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SeriaNo	CtrtLocationSubject	Priprity
	Y 10:	(D):		×D:	:0:	-D:	0	×D:	0:	-0-	(D:	-0:	(D:	
Information	E CN0001003	Young Bectric		Awaiting Acceptance		10:09:10	Test account balances	CR	Change Request	-	-	107	-	
- 🖸 Durban	CN0001002	Samanthas Diner	13/12/2022			16:18:30	Test account balances Test call for account balances manual.	DR	Select Cal Type			19-12/1202		
New	E CN0001002	Young Electric		UnAssigned	Mary Inompson	11:29:19	Order the same part twice receive with different batch num					19-12/1202 10123		
 In Progress 	E CN0001001					11:29:19		CR NDR	Change Request			sm123		
🕑 Hold 👝		Hope Works (Pty) Ltd	31/10/2022				ForRentalContract		New Deal Rental	_			BPO2 TEST 1	_
🕗 Pending 🔄		Top Vehide Hire		Asialting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP12340LD		
Complete	CN0000991							DR						
_ O AI	E CN0000989	Derton / Technologies		UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
- O Pretoria	E CN0000988	Young Bectric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New In Progress	E CN0000987	Young Electric		UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
Hold	■ CN0000986	Young Electric	07/06/2022			05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
Pending	EE CN0000985	Hope Works (Pty) Ltd		UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
 Complete 	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q AI	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:03:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
 Cape Town 	E CN0000982	Young Bectric		UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
O New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
🕑 Hold	E CN0000972	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			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
 Complete 	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
O AI	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	Unitssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
+ 💽 Bloemfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	524	Scheduled Maintenance			NEW 1234		
O New	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
In Progress	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
() Hold	E CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		03:00:00	BathSinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending Complete	E CN0000964	Hack PC - IT Shop	25/10/2019	UnAssigned		03:00:00	2MS - 2 month service	514	Scheduled Maintenance			147807		
Q Al	E CN0000963	Westwood Dynamic		UnAssigned		08:00:00	SathBinMaint - Bathroom Bin Maintenance	54	Scheduled Meintenance				Checkers Centre - Hilcrest	
3	E CN0000962	Hope Works (Pty) Ltd		UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000960	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E (N0000958	Westwood Dynamic		UnAssigned		03:00:00	BathBinNaint - Bathroom Bin Maintenance	54	Scheduled Meintenance				Checkers Centre - Hildrest	
	E CN0000957	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic		Unitssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies		UnAssigned		03:00:00	245 - 2 month service	SM	Scheduled Maintenance			NEW 1234	Contraction of the second s	
	E 00000399	urcurres sappres		Cristing (CU			2-0 1-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0					12.1112.54		

• Click on the *Close button*.



- When you receive the Input Validation message to confirm;
 - Are you sure you want to close this call, reference no. CN[ref. number]? It cannot be reopened. Answer 'Yes' to close the call.
- Click on Yes.



Home Equipment / Locat			Maintenance / Proj	ects Manufa	scturing Pr	ocurement	Sales Service Reporting Utilities				- 8
d Edit Refresh	IQ Save Layout Image: Save Filter Image: Save Filter	Assign Close	Complete Hold H	Pending Release	Print	Reports					
Find O Filter	CalReference	CustomerName	CalDate	CallState	Technician	CalTime	Description	CallTys	e CallTypeDesc	ErrorCode	ErrorCodel
	Y ID:	AD:	Calbate		il:	(D:		-Carry;	ID:	ID:	*D:
Information										10.	-U-
👻 🔯 Durban	▶ ⊞ CN0001033	Young Electric	05/12/2023	Awaiting Ac	David Gray	15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale		
O New		Hope Works (Pty) Ltd	28/09/2023	UnAssigned		15:01:06	Instant billing - using selling price	INSP	Inspection		
 In Progress 	E CN0001029	Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:58:24	now with prior and current meter reading with issue		Inspection		
() Hold		Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:51:46	Toner yield short fall - batch bill no, yield track yes,		Installation		
Pending		Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:38:59	Toner yield test number 2	TON	Toner Required		
 Complete 	E CN0001026	Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:10:24	Black toner replacement required	TON	Toner Required		
All		Top Vehide Hire	28/09/2023	UnAssigned		12:54:20	Black Toner replacement required	INSP	Inspection		
👻 🔯 Pretoria		Derton / Technologies	08/09/2023	Input Validati	on		imes sved.	INSP	Inspection		
New	⊞ CN0001020	Derton / Technologies	08/09/2023				aned.	INST	Installation		
 In Progress 	⊞ CN0001019	Derton / Technologies	08/09/2023				this call, reference no.	INST	Installation		
() Hold	E CN0001018	Derton / Technologies	07/09/2023			nnot be reope	ened. Answer 'Yes' to close the	INST	Installation		
Pending	E CN0001016	Hope Works (Pty) Ltd	05/09/2023	can			ct item that has	sla INSP	Inspection	SERV	Services
O Complete	E CN0001004	Derton / Technologies	15/03/2023				Review	ADM	Administration		
O AI	E CN0000992	Top Vehicle Hire	05/09/2023				Yes No Jume printing re	quirement SERV	Service		
Cape Town New	E CN0000981	Hope Works (Pty) Ltd	11/12/2019	Ended Work	Arial Blythe	09:55:00	test placing call on hold	ADM	Administration		
In Progress	E CN0000980	Hope Works (Pty) Ltd	21/11/2019	Ended Work	Arial Blythe	12:16:47	Driver Connect - offline test	TON	Toner Required		
() Hold	E CN0000979	Hope Works (Pty) Ltd	21/11/2019	Ended Work		11:56:31	Third driver connect call	SERV	Service		
Pending	E CN0000978	Hope Works (Pty) Ltd	21/11/2019	Ended Work		11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement		
Complete	E CN0000977	Hope Works (Pty) Ltd	21/11/2019		Arial Blythe	11:04:46	Driver Connect - toner delivery	SERV	Service		
O All	E CN0000977		21/11/2019	No Signature		11:04:46	Test call email functionality	ADM	Administration		
- Bloemfontein		Dancing Shoes			Anai diythe						
New New		Samanthas Diner		UnAssigned		16:31:46	Phase 1 equipment inspection	SM	Scheduled Maintenance		
In Progress		Samanthas Diner		UnAssigned		16:31:46	Phase 1 equipment inspection	SM	Scheduled Maintenance		
() Hold		Young Electric	11/11/2019	Ended Work			Test Service balances time logging	NDS	New Deal Sale		
Pending		Hope Works (Pty) Ltd	15/10/2019	Accepted	Bianca Du T		it seems like call notes are not saving for call reques		Select Call Type		
 Complete 		Telerex	04/07/2019	UnAssigned		09:34:18	test	DR	Select Call Type		
O All	Count: 101										

- When you receive the *Call Module Closure* message to confirm; *Please add the action taken to resolve this call?*
- Click on OK.

Ψ				Call Listin	g - BPO: Versi							- 2
Home Equipment / Locations	Contract Fina	nce / HR Inventory	Maintenance / Proje	ects Manufa	ecturing Pro	ocurement	Sales Service Repor	ting Utilities				- 8
d Edit Refresh My Calls	Save Layout Workspaces * Save Filter Format	My Call Assign Start Work	omplete Hold F	rending Releas	e Print	Reports						
Find O Filter												
	CalReference	CustomerName	CalDate	CallState	Technician	CallTime	Description		CallType	CallTypeDesc	ErrorCode	ErrorCodeDe
	Y (D:	*D:	-	8 0 0	×0:	(D):	4 0 0		×0:	(D):	• 0 <	×0:
Information	▶ ⊞ CN0001033	Young Electric		Awaiting Ac	David Grav	15:42:01	Test Quote Add Attachment	t to email	NDS	New Deal Sale		
🗸 💽 Durban	E CN0001030	Hope Works (Ptv) Ltd	28/09/2023	UnAssigned		15:01:06	Instant biling - using selling		INSP	Inspection		
O New	E CN0001029	Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:58:24	now with prior and current r		INSP	Inspection		
In Progress	E CN0001028	Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:51:46		bill no, yield track yes, on cont	INST	Installation		
Hold Pending	E CN0001027	Hope Works (Pty) Ltd	28/09/2023	UnAssigned		13:38:59	Toner yield test number 2		TON	Toner Required		
Complete	E CN0001026	Hope Works (Ptv) Ltd	28/09/2023	UnAssigned		13:10:24	Black toner replacement rec	uired	TON	Toner Required		
O Al	E CN0001025	Top Vehicle Hire	28/09/2023	UnAssigned		12:54:20	Black Toner replacement re	guired	INSP	Inspection		
Pretoria	E CN0001021	Derton / Technologies	08/09/2023	UnAs Call M	odule - Closur	e	×	be received.	INSP	Inspection		
O New	E CN0001020	Derton / Technologies	08/09/2023	UnAs				be actioned.	INST	Installation		
 In Progress 	E CN0001019	Derton / Technologies	08/09/2023	UnAs				approval	INST	Installation		
🚯 Hold	E CN0001018	Derton / Technologies		UnAs 💌	Please add	the action ta	ken to resolve this call?	then flag	INST	Installation		
Pending	E CN0001016	Hope Works (Ptv) Ltd		UnAs				contract item that has sla	INSP	Inspection	SERV	Services
O Complete	E CN0001004	Derton / Technologies						onality Review	ADM	Administration		
() Al	E CN0000992	Top Vehicle Hire		Awai			ОК	high volume printing requirement	SERV	Service		
Cape Town	E CN0000981	Hope Works (Pty) Ltd	11/12/2019	Ended Work	Arial Blythe	09:55:00	test placing call on hold		ADM	Administration		
In Progress	E CN0000980	Hope Works (Pty) Ltd	21/11/2019	Ended Work	Arial Blythe	12:16:47	Driver Connect - offline test		TON	Toner Required		
() Hold	E CN0000979	Hope Works (Pty) Ltd	21/11/2019	Ended Work		11:56:31	Third driver connect call		SERV	Service		
Pending	E CN0000978	Hope Works (Pty) Ltd	21/11/2019	Ended Work		11:07:42	Driver Connect - full set of t	toners required	PR	Parts Requirement		
O Complete	E CN0000977	Hope Works (Pty) Ltd	21/11/2019	Ended Work		11:04:46	Driver Connect - toner deliv		SERV	Service		
O AI		Dancing Shoes	18/11/2019	No Signature		16:24:55	Test call email functionality		ADM	Administration		
Bloemfontein	E CN0000842	Samanthas Diner	12/11/2019	UnAssigned		16:31:46	Phase 1 equipment inspection	20	SM	Scheduled Maintenance		
New		Samanthas Diner	12/11/2019			16:31:46	Phase 1 equipment inspection		SM	Scheduled Maintenance		
 In Progress 	E CN0000841			Ended Work	Bianca Du T		Test Service balances time I		NDS	New Deal Sale		
() Hold	E CN0000832	Hope Works (Ptv) Ltd	15/10/2019	Accepted	Bianca Du T		it seems like call notes are n		DR	Select Call Type		
Pending	E CN0000822	Telerex	04/07/2019			09:34:18	test	and an and the press	DR	Select Call Type		
Complete All				on a subgried		00101120				acceleration and the		
0 4	Count: 141											
	4											

- The *Comments Call Ref: [] for* screen will pop up.
- Any *work orders* linked to this call will be listed in the *text box*.
- Type in the *call closure comments* next to the work order numbers.



• Note: These comments will automatically pull through if you have updated the rectification comments on the work order.

Home Equipment / Location	s Contract Fin	ance / HR Inventory	Maint	Call Listing - BPO: Version 2.5.1.4 - v2514 Example Company enance / Projects Manufacturing Procurement Sales Service Reporting Utility	ies					- 8
Add Edt Refresh My Calls	🖏 Save Filter		G	Pending Percent Hold Pending Rebases Pent Reports Process						
Find O Filter										
0110	CalReference	CustomerName		CalDate CalState Technician CallTime Description			CallType	CallTypeDesc	ErrorCode	ErrorCodeDe
	Y (D:	-D:		Comments - Call Ref: CN0001033 for	×		×0:	(D:	(D):	100
Information	► E CN0001033	Young Electric			^		NDS	New Deal Sale		
👻 🔯 Durban	E CN0001030	Hope Works (Ptv) Ltd		Home			INSP	Inspection		
New	E CN0001029	Hope Works (Pty) Ltd		💾 🖕	ssues		INSP	Inspection		
In Progress	E CN0001029	Hope Works (Pty) Ltd		Save Back			INST	Installation		
() Hold	E CN0001028	Hope Works (Pty) Ltd Hope Works (Pty) Ltd			yes, c	ar cont	TON	Toner Required		
Pending	E CN0001027	Hope Works (Pty) Ltd		Process a			TON	Toner Required		
Complete				WO0002947 : Emailing process completed as required.						
O All	E CN0001025	Top Vehicle Hire					INSP	Inspection		
v 🖸 Pretoria		Derton / Technologies					INSP	Inspection		
New In Progress		Derton / Technologies					INST	Installation		
Hold		Derton / Technologies					INST	Installation		
Pending		Derton / Technologies					INST	Installation		
C Complete	E CN0001016	Hope Works (Pty) Ltd			t has :	sla	INSP	Inspection	SERV	Services
O Al		Derton / Technologies					ADM	Administration		
- 🖸 Cape Town		Top Vehide Hire			ng red	quirement	SERV	Service		
O New	E CN0000981	Hope Works (Pty) Ltd					ADM	Administration		
In Progress	E CN0000980	Hope Works (Pty) Ltd					TON	Toner Required		
() Hold	E CN0000979	Hope Works (Pty) Ltd					SERV	Service		
Pending		Hope Works (Pty) Ltd					PR	Parts Requirement		
 Complete 	E CN0000977	Hope Works (Pty) Ltd					SERV	Service		
O All		Dancing Shoes			-		ADM	Administration		
- 🖸 Bloemfontein	E CN0000842	Samanthas Diner					SM	Scheduled Maintenance		
New	E CN0000842	Samanthas Diner		Error Code			SM	Scheduled Maintenance		
In Progress	E CN0000841			11/11/2019 Ended Work Bianca Du T., 15:07:23 Test Service balances time logging			NDS	New Deal Sale		
() Hold	E CN0000832	Hope Works (Ptv) Ltd		15/10/2019 Accepted Bianca Du T 15:05:26 it seems like call notes are not saving for (call cars used		DR	Select Call Type		
Pending	E CN0000832	Telerex		13/10/2019 Accepted blanca UU I 15/05/20 It seems like call notes are not saving for i 04/07/2019 UnAssigned 09:34:18 test	uan request		DR	Select Call Type		
Complete	B CN0000822	Teletex		unio / 20 ta ouveadrado oa car 24:18 test			UK	select call type		
O AI	Count: 141									
pen Windows 👻							Use	r : Bianca 23/01/2024 Versio	n: 2.5.1.4 v2514	Example Com

- You have the option to select an *Error Code* at call closure.
- Click on the *drop-down arrow* in the *Error Code* field to display the *Error Code menu*.
 - Note: If the company configuration is set so that this is mandatory - then you will <u>have</u> to select an error code before saving.



Home Equipment / Locations	Contract Fin	ance / HR Inventory	Mainte	nance / Projects	Manufactur	ing Procurer	nent Sale	s Service Reporting	g Utilities					- 8
dd Edit Refresh My Calls	Image: Save Layout Image: Workspaces * Image: Save Filter Image: Format		Q omplete	Hold Pendin	g Release	Print Repo	orts							
Find O Filter														
	CalReference	CustomerName		alDate Call	State Te	chnician Call	lime De	scription			CallType	CallTypeDesc	ErrorCode	ErrorCodeDe
	Y (D:	×0 <	ſ	Comments -	Call Ref: CNO	1001033 for			. • x	1	* 0 ¢	10c	10:	·D:
Information		Young Electric		Home							NDS	New Deal Sale		
- 🖸 Durban	E CN0001030	Hope Works (Ptv) Ltd									INSP	Inspection		
New	E CN0001029	Hope Works (Pty) Ltd	1.1	💾 😋						SSLIPS.	INSP	Inspection		
 In Progress 	E CN0001029	Hope Works (Pty) Ltd	100	Save Back						ves, on cont		Installation		
() Hold	E CN0001028	Hope Works (Pty) Ltd		Save Dock						yes, on cont	TON	Toner Required		
() Pending	E CN0001027		111	Process 4					\Diamond		TON	Toner Required		
O Complete		Hope Works (Pty) Ltd		WO0002947 : Ema	aling process co	ompleted as requ	red.							
O Al	E CN0001025	Top Vehicle Hire									INSP	Inspection		
v 🖸 Pretoria	E CN0001021	Derton / Technologies									INSP	Inspection		
New In Progress	E CN0001020	Derton / Technologies									INST	Installation		
Hold	E CN0001019	Derton / Technologies									INST	Installation		
Pending		Derton / Technologies									INST	Installation		
Complete		Hope Works (Pty) Ltd								t has sla	INSP	Inspection	SERV	Services
O Al		Derton / Technologies									ADM	Administration		
V Cape Town	⊞ CN0000992	Top Vehicle Hire								ng requirement	SERV	Service		
Ø New		Hope Works (Pty) Ltd									ADM	Administration		
In Progress	E CN0000980	Hope Works (Pty) Ltd									TON	Toner Required		
() Hold	E CN0000979	Hope Works (Pty) Ltd									SERV	Service		
Pending	E CN0000978	Hope Works (Pty) Ltd									PR	Parts Requirement		
O Complete	E CN0000977	Hope Works (Pty) Ltd									SERV	Service		
O Al	E CN0000973	Dancing Shoes									ADM	Administration		
+ 💽 Bloemfontein	E CN0000842	Samanthas Diner		Error Cod			_				SM	Scheduled Maintenance		
O New	E CN0000842	Samanthas Diner		Error Code	-		•				SM	Scheduled Maintenance		
 In Progress 	E CN0000841	Young Electric	1	1/11/2019 End		A Description		Service balances time log	nina		NDS	New Deal Sale		
() Hold	E CN0000832	Hope Works (Pty) Ltd			COL SERV	Service Apps Services		ens like call notes are not		equest	DR	Select Call Type		
Pending	E CN0000822	Telerex			SGRN	Stock - GRN		1000 010 000 010 1101			DR	Select Call Type		
Complete	LD C110300022	- COCK			STIR	Stock - Issue/F	Return			-	U.S.	occer can ripe		
O AI	Count: 141				TECH USRS WARR	Techconnect Users/Security Warranty								
					X	warranty								Example Comp

• When you have finished editing this Comments screen, click on *Save*.

			Call Listing - BPO: Version 2.5.1.4 - v2514 Example Company	- 8
Home Equipment / Location	Contract Fin	ance / HR Inventory Ma	enance / Projects Manufacturing Procurement Sales Service Reporting Utilities	- 67
dd Edit Refresh My Calls	Save Layout	Assign Start	H Contractor Regions Protection Regions	
Find O Filter				
0110	CalReference	CustomerName	CalDate CalState Technician CalTime Description CalType CalTypeDesc	ErrorCode ErrorCode
	Y 10:		Comments - Call Ref: CH0001033 for	(D: (D:
Information	► E CN0001033	Young Electric		
+ 🔯 Durban	E CN0001033	Hope Works (Ptv) Ltd	TAILE	
O New	E CN0001030	Hope Works (Pty) Ltd .	INSP Inspection	
 In Progress 	E CN0001029		Save Back ves. on cont INST Installation	
🕢 Hold	E CN0001028	Hope Works (Pty) Ltd .	Save back yes, on cont INST Installation	
Pending		Hope Works (Pty) Ltd	Process .	
Complete		Hope Works (Pty) Ltd	W00002947 : Emailing process completed as required.	
	E CN0001025	Top Vehide Hire	INSP Inspection	
Pretoria		Derton / Technologies	INSP Inspection	
New		Derton / Technologies	INST Installation	
In Progress Hold		Derton / Technologies .	INST Installation	
Pending		Derton / Technologies	INST Installation	
Complete		Hope Works (Pty) Ltd	t has sla INSP Inspection	SERV Services
O All	E CN0001004	Derton / Technologies .	ADM Administration	
- Cape Town		Top Vehide Hire	ng requirement SERV Service	
O New		Hope Works (Pty) Ltd	ADM Administration	
In Progress		Hope Works (Pty) Ltd .	TON Toner Required	
() Hold	E CN0000979	Hope Works (Pty) Ltd	SERV Service	
Pending	E CN0000978	Hope Works (Pty) Ltd	PR Parts Requirement	
 Complete 	E CN0000977	Hope Works (Pty) Ltd	SERV Service	
O Al	E CN0000973	Dancing Shoes	ADM Administration	
+ 🔯 Bloemfontein		Samanthas Diner		
New		Samanthas Diner	Error Code Services SM Scheduled Maintenance	
In Progress	E CN0000841		11/11/2019 Ended Work Blanca Du T 15:07:23 Test Service balances time logging NDS New Deal Sale	
() Hold	E CN0000832	Hope Works (Pty) Ltd	15/10/2019 Accepted Bianca Du T 15:05:26 it seems like call notes are not saving for call request DR Select Call Type	
Pending	E CN0000822	Telerex	13/12/2013 Accepted banka bull 13/3/20 It seems we call holes are not saving for call request. DR Select Call Type 04/07/2019 UnAssigned 09:34:18 test DR Select Call Type	
Complete All	LD C10000822	TODICA .	outorite entre ent	
O AI	Count: 141			
	4			

- A *Call Module Closure* message box will pop up, informing you that;
 - The call, reference [], has been closed.
- Click on Ok.



 Note: On close, the system will automatically *close* the linked *work order*.

Home Equipment / Locations	Contract - Day	ance / HR Inventory	Malak					v2514 Example Company Sales Service Reporti					- 2
			Maint		ects manufi	acturing Pr	ocurement	Sales Service Report	ing Utilities				- 0
Edit Refresh My Calls	Image: Save Layout Image: Save Filter	≪ My Call ≪ Assign Close C	Complet	e Hold P	Pending Relea	se Print	Reports						
Find O Filter													
	CalReference	CustomerName		CalDate	CallState	Technician	CallTime	Description		CallType	CallTypeDesc	ErrorCode	ErrorCodel
	Y 10:	 ID: 			×D:	×D:	(D:	100		10:	(D:	10:	×D:
formation	E CN0001033	Young Electric			Awaiting Ac	David Gray	15:42:01	Test Quote Add Attachment	to email	NDS	New Deal Sale		
🔯 Durban	E CN0001030	Hope Works (Ptv) Ltd			UnAssigned		15:01:06	Instant billing - using selling p		INSP	Inspection		
New	E CN0001029	Hope Works (Pty) Ltd			UnAssigned		13:58:24	now with prior and current m		INSP	Inspection		
In Progress	E CN0001029	Hope Works (Pty) Ltd			UnAssigned		13:50:24		bil no, yield track yes, on cont		Installation		
() Hold	E CN0001028	Hope Works (Pty) Ltd Hope Works (Pty) Ltd			UnAssigned		13:31:46	Toner yield test number 2	on no, yea and yes, on cont	TON	Toner Required		
Pending	E CN0001027	Hope Works (Pty) Ltd			UnAssigned		13:10:24	Black toner replacement reg.	dand.	TON	Toner Required		
O Complete	E CN0001025						12:54:20			INSP			
O AI		Top Vehide Hire			UnAssigned			Black Toner replacement req			Inspection		
Pretoria	CN0001021	Derton / Technologies		08/09/2023		odule - Closur	e		be received.	INSP	Inspection		
New In Progress	CN0001020	Derton / Technologies		08/09/2023	UnA				be actioned.	INST	Installation		
() Hold		Derton / Technologies		08/09/2023	UnA 1	The call re	ference CN00	01022 har been closed	approval	INST	Installation		
Pending		Derton / Technologies		07/09/2023	UnA:				then flag	INST	Installation		
Complete		Hope Works (Pty) Ltd		05/09/2023	UnA				contract item that has sla	INSP	Inspection	SERV	Services
O All		Derton / Technologies		15/03/2023	Ende			ОК	ionality Review	ADM	Administration		
Cape Town		Top Vehide Hire		05/09/2023	Awa				high volume printing requirement	SERV	Service		
O New		Hope Works (Pty) Ltd		11/12/2019	Ended Work	Arial Blythe	09:55:00	test placing call on hold		ADM	Administration		
 In Progress 	CN0000980	Hope Works (Pty) Ltd		21/11/2019	Ended Work	Arial Blythe	12:16:47	Driver Connect - offline test		TON	Toner Required		
() Hold	E CN0000979	Hope Works (Pty) Ltd		21/11/2019	Ended Work	Arial Blythe	11:56:31	Third driver connect call		SERV	Service		
Pending	⊞ CN0000978	Hope Works (Pty) Ltd		21/11/2019	Ended Work	Arial Blythe	11:07:42	Driver Connect - full set of to	oners required	PR	Parts Requirement		
Complete	E CN0000977	Hope Works (Pty) Ltd		21/11/2019	Ended Work	Arial Blythe	11:04:46	Driver Connect - toner delive	sry	SERV	Service		
O All	CN0000973	Dancing Shoes		18/11/2019	No Signature	Arial Blythe	16:24:55	Test call email functionality		ADM	Administration		
O Bloemfontein		Samanthas Diner		12/11/2019	UnAssigned		16:31:46	Phase 1 equipment inspection	n	SM	Scheduled Maintenance		
New		Samanthas Diner		12/11/2019	UnAssigned		16:31:46	Phase 1 equipment inspection		SM	Scheduled Maintenance		
In Progress	E CN0000841			11/11/2019		Bianca Du T.,		Test Service balances time lo		NDS	New Deal Sale		
() Hold	E CN0000832	Hope Works (Ptv) Ltd			Accepted	Bianca Du T		it seems like call notes are no		DR	Select Call Type		
Pending	E CN0000822	Telerex		04/07/2019			09:34:18	test	in an included	DR	Select Call Type		
Complete	La composée						09101120			-	accel con 1996		
O AI	Count: 141												

You can now view the closed call in the *Call Listing* by <u>searching</u> for the specific call number, which will open the call maintain screen. *Closed* calls have been removed from the Call Screen for <u>performance enhancements</u>.

MNU.122.012