

# SERVICE

## CALLS – ADD LABOUR TIME

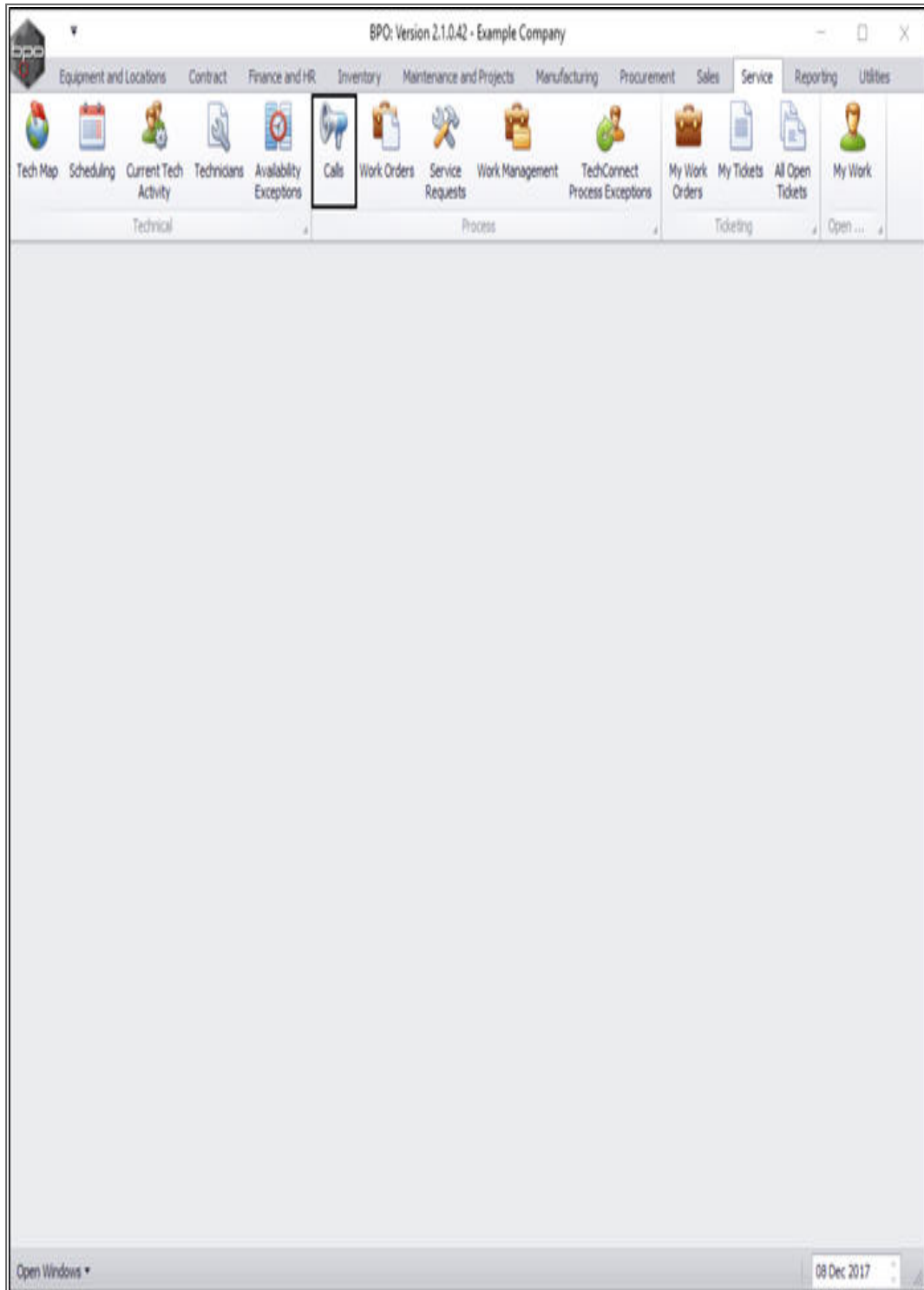
If the time booked is for the same day the technician was assigned, you can just click in front of the relevant technician in the 'Time' tab and 'Edit' the record.

If the time booked is for another day, use the 'Add Record' process as explained below.

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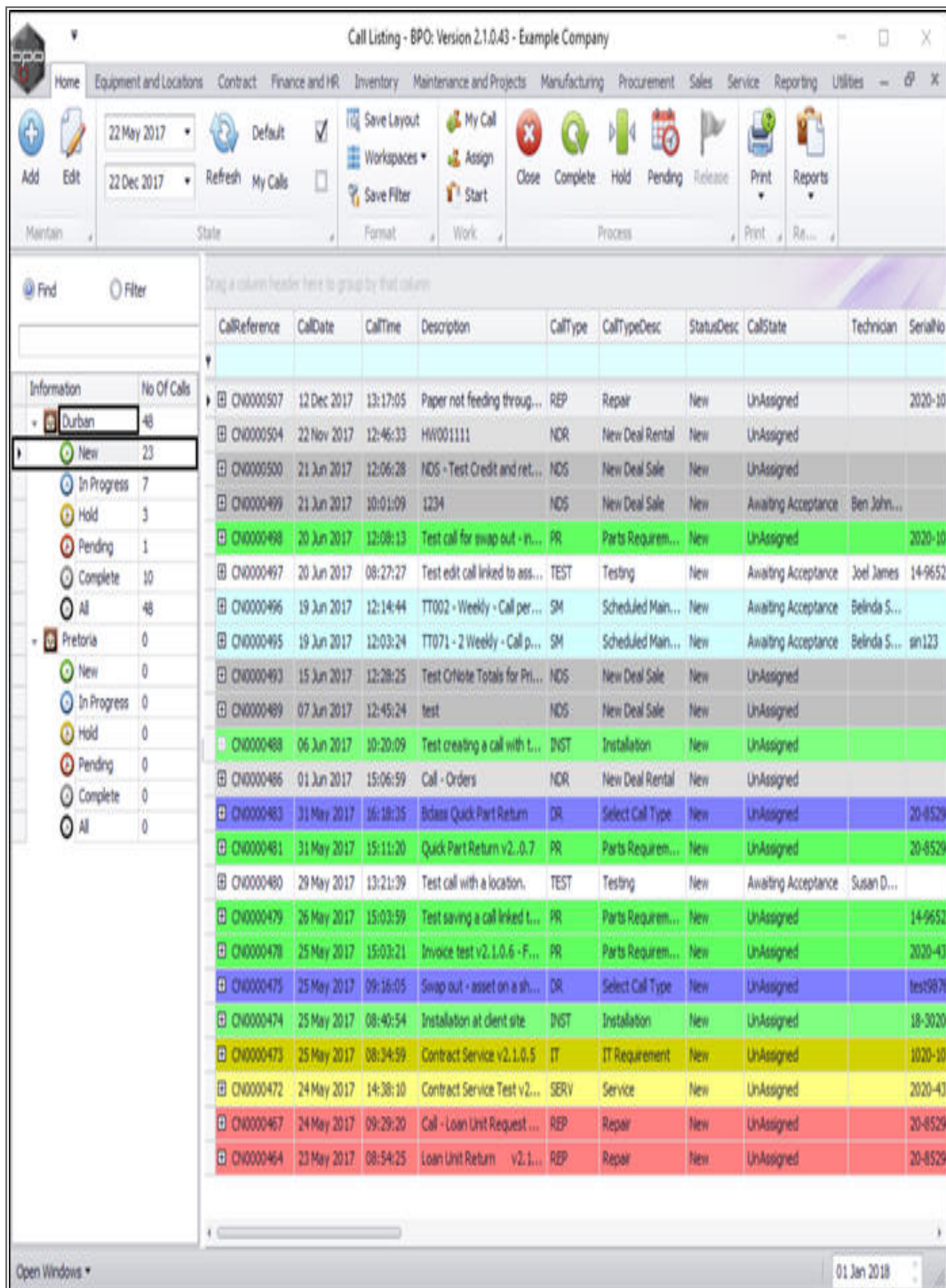
**Ribbon Access:** *Service > Calls*

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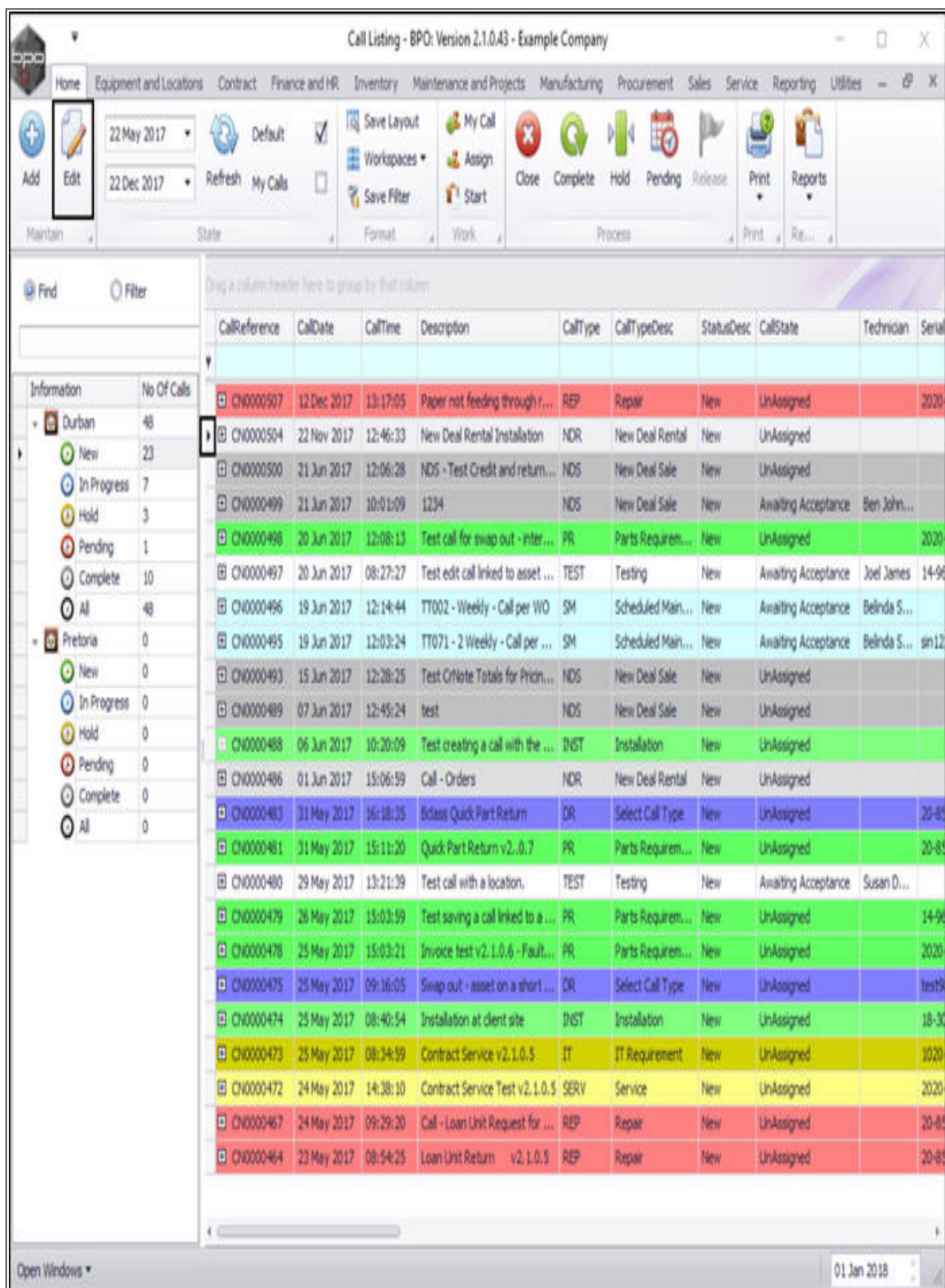
The ***Call Listing*** screen will be displayed.

- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.



CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - v...	PR	Parts Requirem...	New	UnAssigned		2020-10
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	an123
CH0000493	15 Jun 2017	12:28:25	Test Criote Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bidass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-8529
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-8529
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		test9876
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-3020
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-8529
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

- Click on the **row selector** in front of the **call** you wish to **log labour time** to.
- Click on **Edit**.



Call Listing - BPO: Version 2.1.0.43 - Example Company

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

Add Edit 22 May 2017 22 Dec 2017 Default Refresh My Calls Save Layout Workspaces Save Filter My Call Assign Start Close Complete Hold Pending Release Print Reports

Find Filter

Information No Of Calls

- Durban 48
- New 23
- In Progress 7
- Hold 3
- Pending 1
- Complete 10
- All 48
- Pretoria 0
- New 0
- In Progress 0
- Hold 0
- Pending 0
- Complete 0
- All 0

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	Serial
CH0000507	12 Dec 2017	13:17:05	Paper not feeding through r...	REP	Repair	New	UnAssigned		2020
CH0000504	22 Nov 2017	12:46:33	New Deal Rental Installation	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and return...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - inter...	PR	Parts Require...	New	UnAssigned		2020
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to asset ...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-98
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per W/O	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call per ...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	sin12
CH0000493	15 Jun 2017	12:28:25	Test ChNote Totals for Pric...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with the ...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:15	Bidass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-85
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Require...	New	UnAssigned		20-85
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	28 May 2017	15:03:59	Test saving a call linked to a ...	PR	Parts Require...	New	UnAssigned		14-98
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - Fault...	PR	Parts Require...	New	UnAssigned		2020
CH0000475	25 May 2017	09:18:05	Swap out - asset on a short ...	DR	Select Call Type	New	UnAssigned		test9
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020
CH0000472	24 May 2017	14:38:10	Contract Service Test v2.1.0.5	SERV	Service	New	UnAssigned		2020
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request for ...	REP	Repair	New	UnAssigned		20-85
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1.0.5	REP	Repair	New	UnAssigned		20-85

Open Windows 01 Jan 2018

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

- Click on the ***Work Orders*** tile.

Call maintenance : Call ref. : CN0000504 - BPO: Version 2.1.0.43 - Example Company

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

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

Maintain Process Format Print Info

Links  
Enter text to search...

Functions

Work Orders 1

Work In Progress

Notes

Assignments

Hold History

Pending History

On Site Info 1

Customer Hope Works

Contact Davina Rowe

Contact No. 031 123 4567

Address Plot 91 Leaf Road  
Forest Hills  
New Town  
Durban South

Call Type New Deal Rental

Error Code

Description New Deal Rental Installation

Call Date Time 22 Nov 2017 12:46:33

Priority 2

SLA 0.00

Date Required 29 Nov 2017

Order No OR0000207

Logged By AbigailM

Status NI - New

Optional No

Relates To :

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	OR0000207

Closure Details :

Action

Closure Date Time 00:00:00

Closed By

Meters

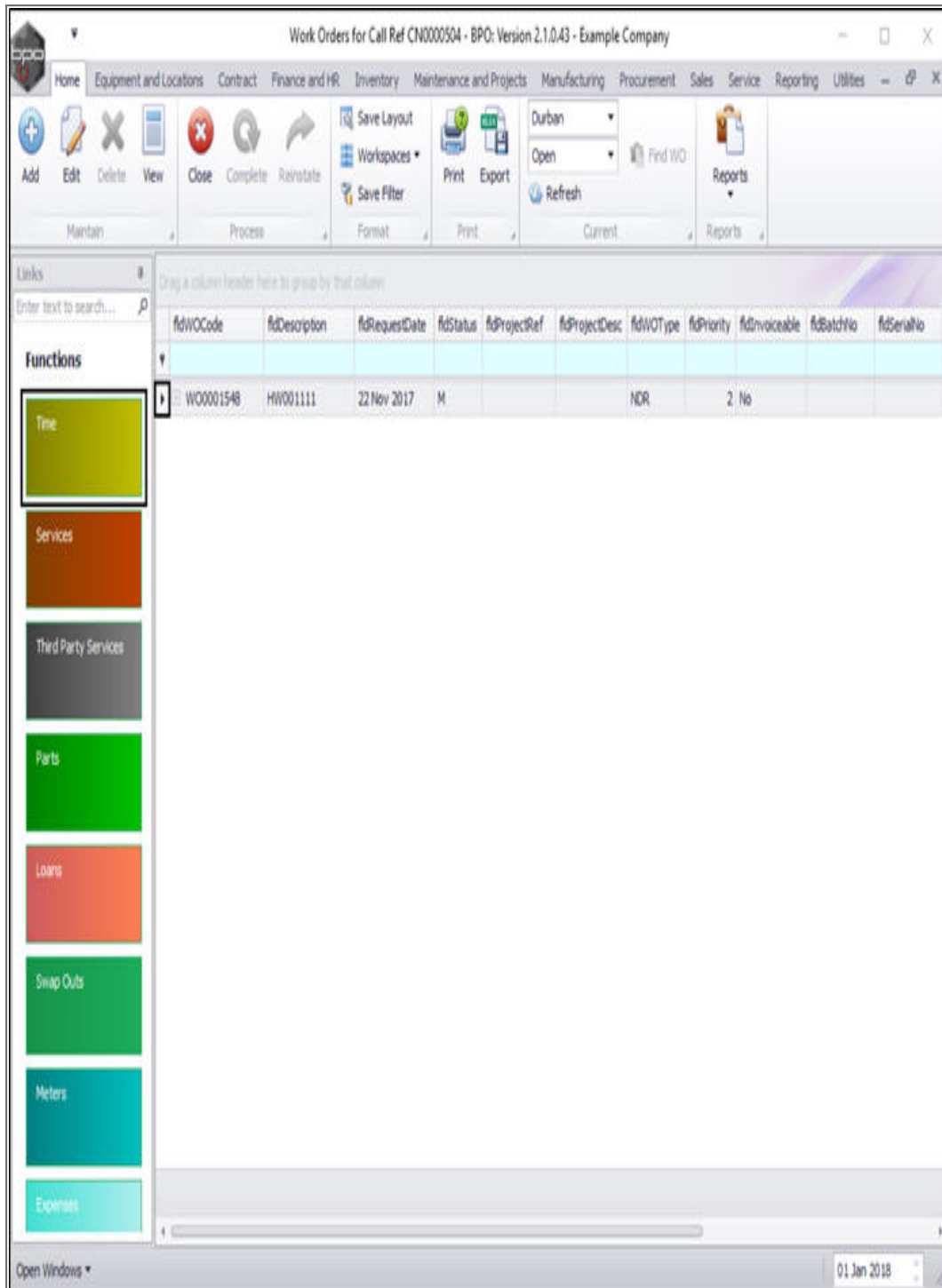
Open Windows

01 Jan 2018

The **Work Orders for Call Ref [ ]** screen will be displayed.



- Click on the **row selector** in front of the **work order** that you wish to **log labour time** to.
- Click on the **Time** tile.

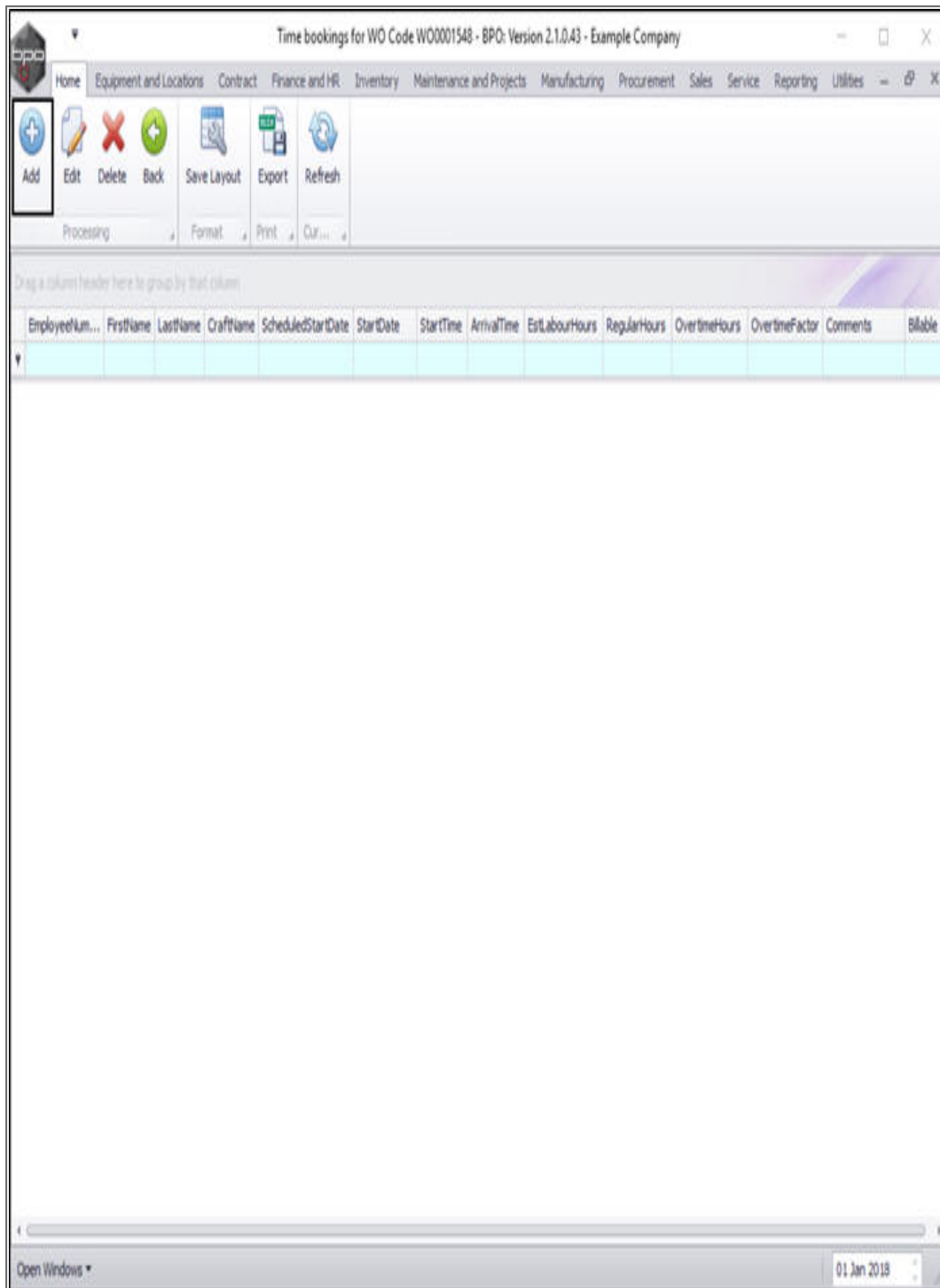


The screenshot displays the 'Work Orders for Call Ref CN0000504 - BPO: Version 2.1.0.43 - Example Company' window. The interface includes a top menu bar with various functional areas like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a ribbon with icons for Add, Edit, Delete, View, Close, Complete, Reinstale, Save Layout, Workspaces, Save Filter, Print, Export, Find WO, and Reports. The main area shows a table of work orders with columns: fdWOCODE, fdDescription, fdRequestDate, fdStatus, fdProjectRef, fdProjectDesc, fdWOType, fdPriority, fdInvoiceable, fdBatchNo, and fdSerialNo. A sidebar on the left contains a 'Functions' section with several colored tiles: Time (yellow), Services (orange), Third Party Services (grey), Parts (green), Loans (red), Swap Outs (teal), Meters (blue), and Expenses (light blue). The 'Time' tile is currently selected and highlighted. At the bottom, there is an 'Open Windows' dropdown and a date indicator showing '01 Jan 2018'.

fdWOCODE	fdDescription	fdRequestDate	fdStatus	fdProjectRef	fdProjectDesc	fdWOType	fdPriority	fdInvoiceable	fdBatchNo	fdSerialNo
WO0001548	HW001111	22 Nov 2017	M			NDR	2	No		

The ***Time Bookings for WO Code [ ]*** screen will be displayed.

- Click on ***Add***.



Time bookings for WO Code WO0001548 - BPO: Version 2.1.0.43 - Example Company

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

Add Edit Delete Back Save Layout Export Refresh

Processing Format Print Cur...

Drag a column header here to group by that column

EmployeeNum...	FirstName	LastName	CraftName	ScheduledStartDate	StartDate	StartTime	ArrivalTime	EstLabourHours	RegularHours	OvertimeHours	OvertimeFactor	Comments	Billable

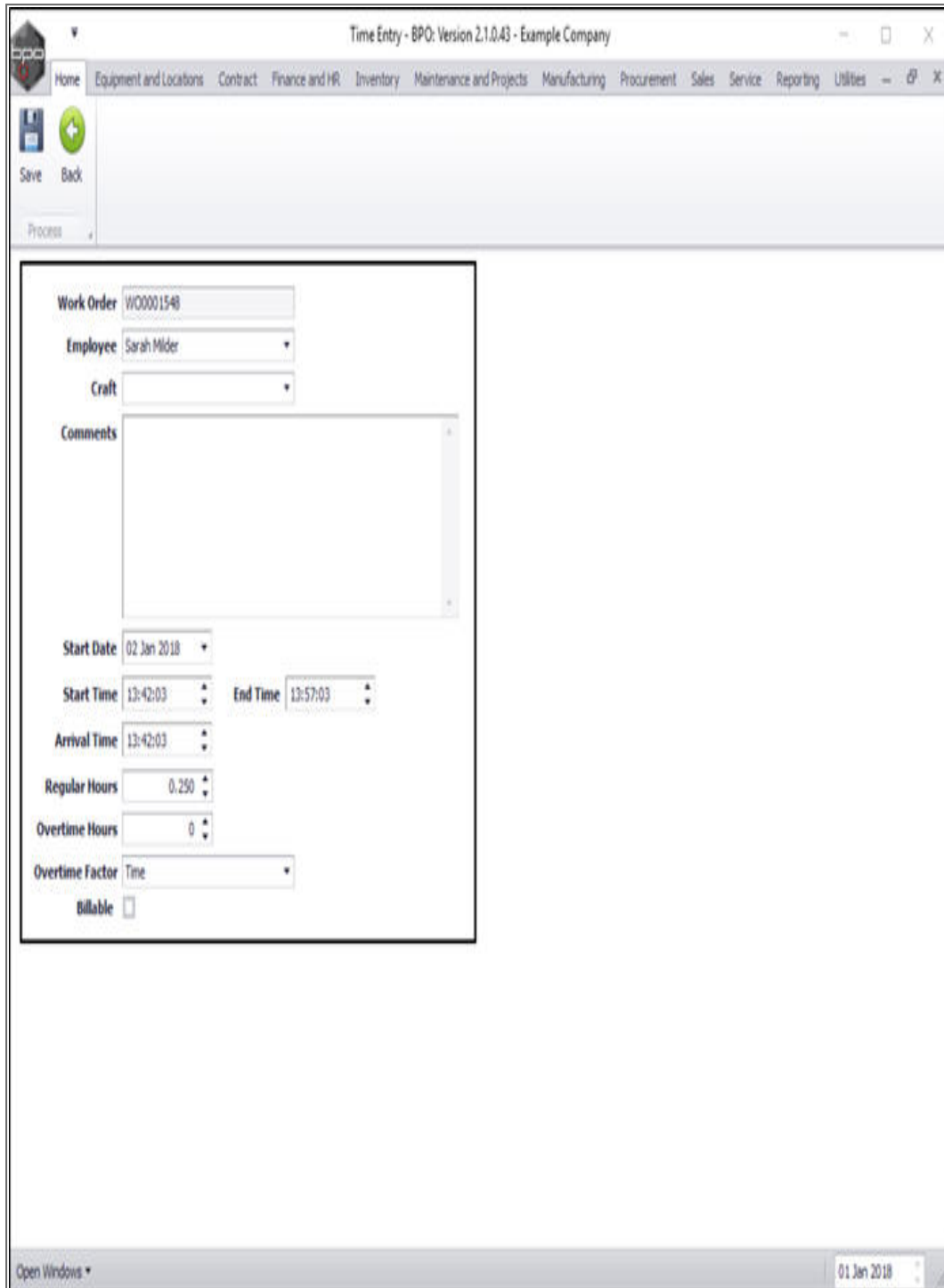
Open Windows 01 Jan 2019



The **Time Entry** screen will be displayed.

- **Work Order:** This will auto populate according to the work order initially selected.
  - **Employee:** This will auto populate with the name of the person currently logged on to the system but you can click on the drop-down arrow and select an alternative employee from the menu as required.
  - **Craft Name:** Click on the drop-down arrow and select a craft from the menu. The menu will only have selections relating to the crafts of the employee selected above.
  - **Comments:** Type in the work done for the hours logged.
  - **Start Date:** This will default to the current date. Click on the drop-down arrow and use the calendar function to select an alternative date if required.
  - **Start Time, End Time and Arrival Time:** These will all be set to 12:00 am by default, type in or use the arrow indicators to change to the correct times.
  - **Regular hours:** If the Start and End Times are entered, the system will calculate this, otherwise, type in or use the arrow indicators to select the amount.
  - **Overtime Hours:** Type in or use the arrow indicators to record any overtime hours.
  - **Overtime Factor:** Click on the drop-down arrow, and select the overtime factor.
  - **Billable:** Select this check box if the service is billable.
- 
- **Note:** This will be set to billable by

default, unless the service is linked to the contract as an inclusion.



Time Entry - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

Work Order: W00001548

Employee: Sarah Milder

Craft:

Comments:

Start Date: 02 Jan 2018

Start Time: 13:42:03 End Time: 13:57:03

Arrival Time: 13:42:03

Regular Hours: 0.250

Overtime Hours: 0

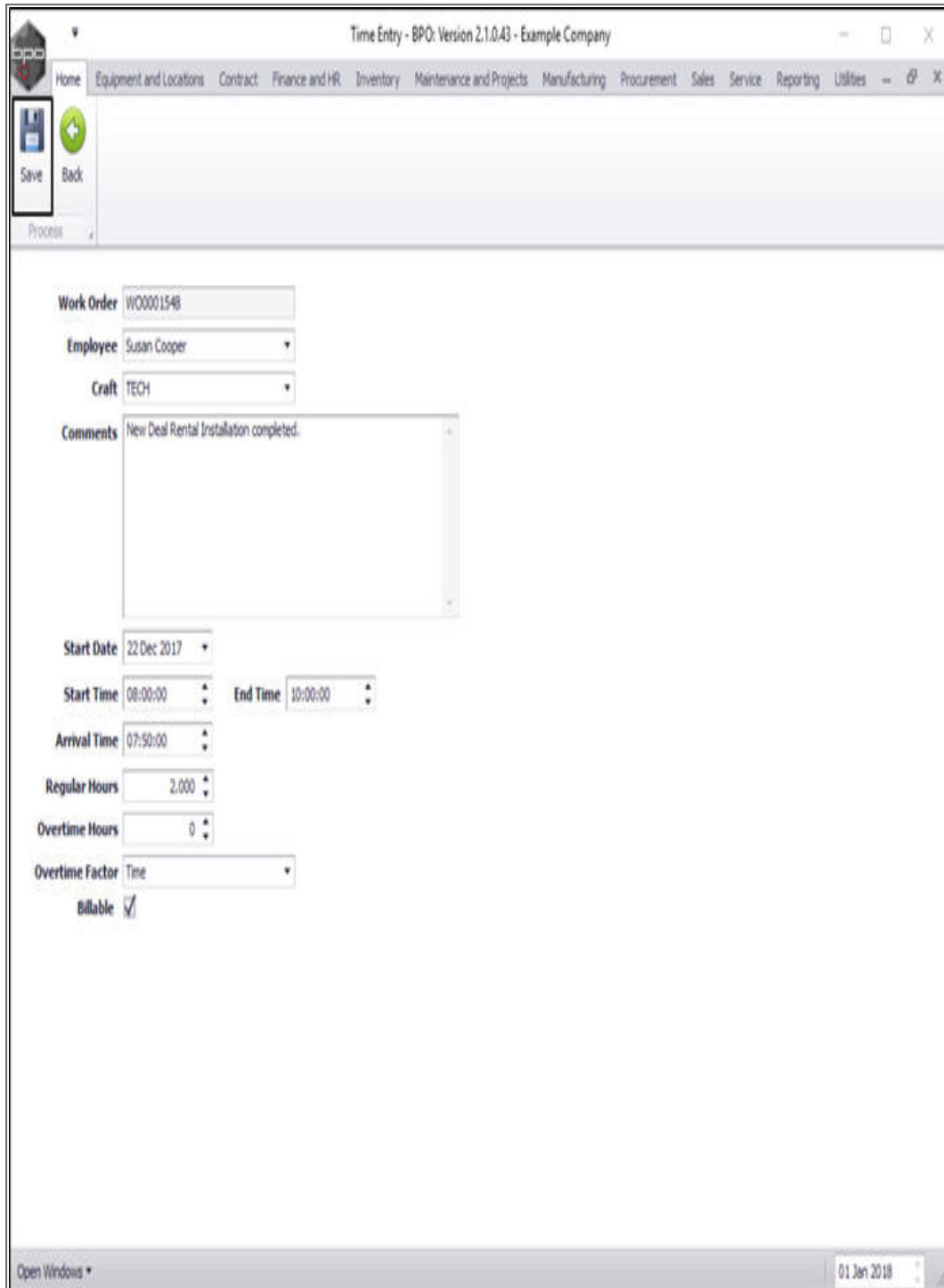
Overtime Factor: Time

Billable: ☐

Open Windows

01 Jan 2018

- When you have finished editing the Time Entry screen, click on **Save**.



Time Entry - BPO: Version 2.1.0.43 - Example Company

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

Save Back Process

Work Order WO0001548

Employee Susan Cooper

Craft TECH

Comments New Deal Rental Installation completed.

Start Date 22 Dec 2017

Start Time 08:00:00 End Time 10:00:00

Arrival Time 07:50:00

Regular Hours 2.000

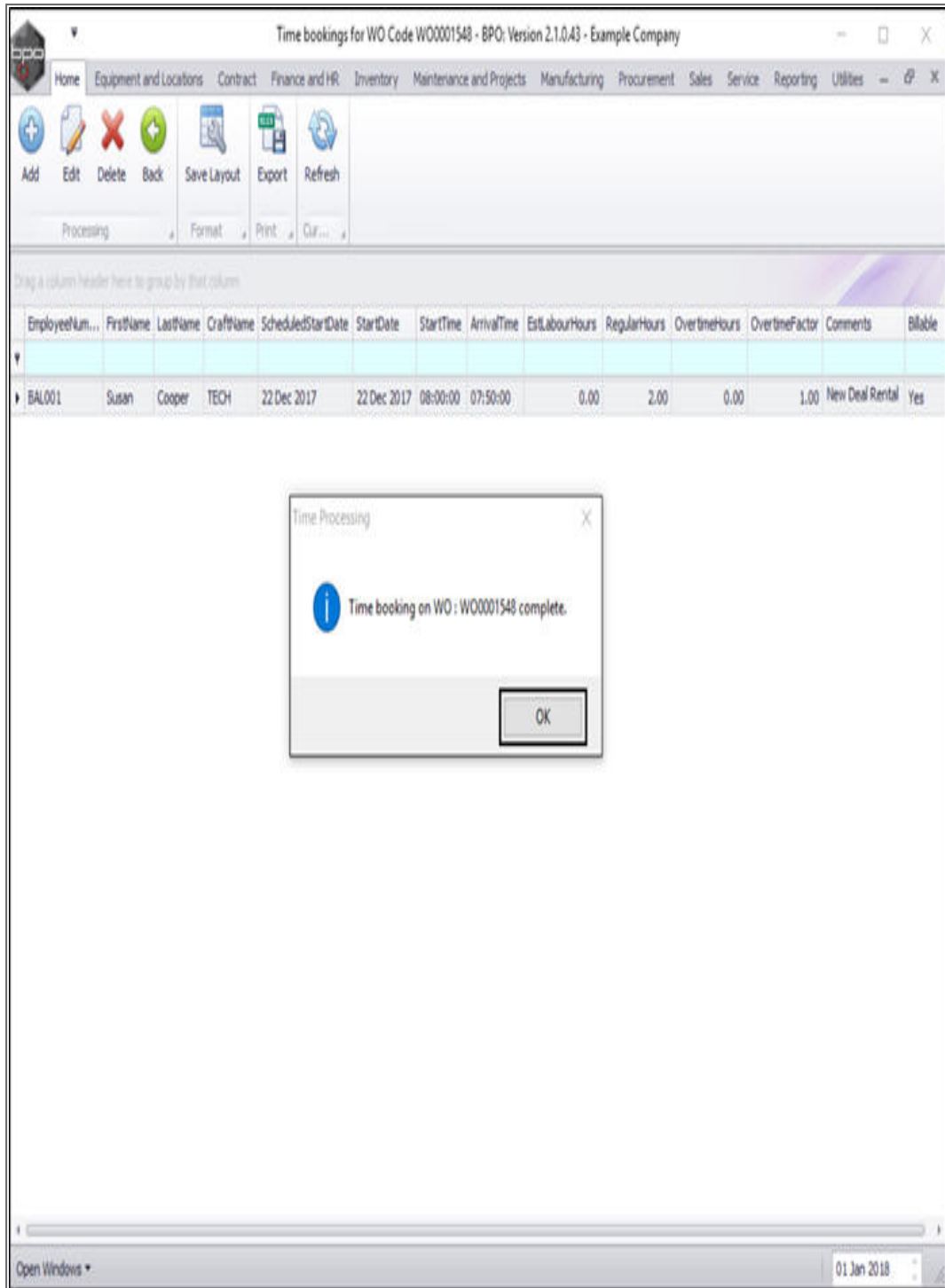
Overtime Hours 0

Overtime Factor Time

Billable ☒

Open Windows 01 Jan 2018

- You will return to the *Time Bookings for WO Code [ ]* screen.
- A *Time Processing* message box will pop up informing you that;
  - *Time Booking on WO: [ ] complete.*
- Click on **OK**.



Time bookings for WO Code WO0001548 - BPO: Version 2.1.0.43 - Example Company

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

Add Edit Delete Back Save Layout Export Refresh

Processing Format Print Cut...

Drag a column header here to group by that column

EmployeeNum...	FirstName	LastName	CraftName	ScheduledStartDate	StartDate	StartTime	ArrivalTime	EstLabourHours	RegularHours	OvertimeHours	OvertimeFactor	Comments	Billable
BAL001	Susan	Cooper	TECH	22 Dec 2017	22 Dec 2017	08:00:00	07:50:00	0.00	2.00	0.00	1.00	New Deal Rental	Yes

Time Processing

Time booking on WO : WO0001548 complete.

OK

Open Windows 01 Jan 2018

- You can now view the newly logged labour time in this screen.

Time bookings for WO Code WO0001548 - BPO: Version 2.1.0.43 - Example Company

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

Add Edit Delete Back Save Layout Export Refresh

Processing Format Print Cut...

Drag a column header here to group by that column

EmployeeNum...	Firstname	Lastname	Craftname	ScheduledStartDate	StartDate	StartTime	ArrivalTime	EstLabourHours	RegularHours	OvertimeHours	OvertimeFactor	Comments	Billable
BAL001	Susan	Cooper	TECH	22 Dec 2017	22 Dec ...	08:00:00	07:50:00	0.00	2.00	0.00	1.00	New Deal Rental	Yes

Open Windows 01 Jan 2018

MNU.122.014