

SERVICE

CALLS – ADD TRAVEL

If you want to keep track of travel done by a technician, you can log this on the call.

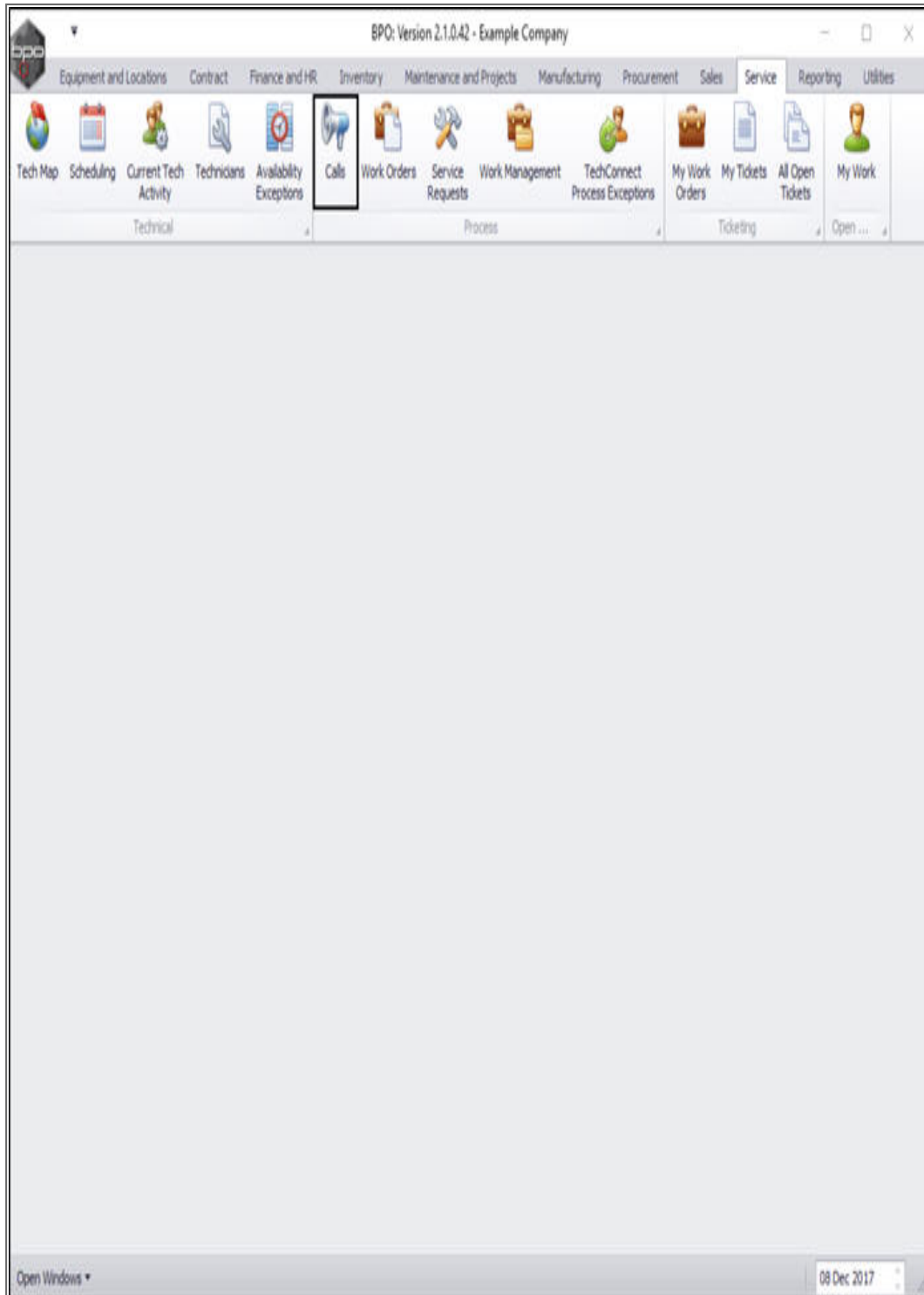
The travel logged on a call will not be billed.

The system previously used the **Billable** flag in order to invoice travel, however, travel is now billed via **Travel Radii** or **Travel Zones** - which will check the contract / asset configuration to see whether travel should be billed or not.

Travel can also be added to an invoice separately. **Travel Radii** must be set up correctly.

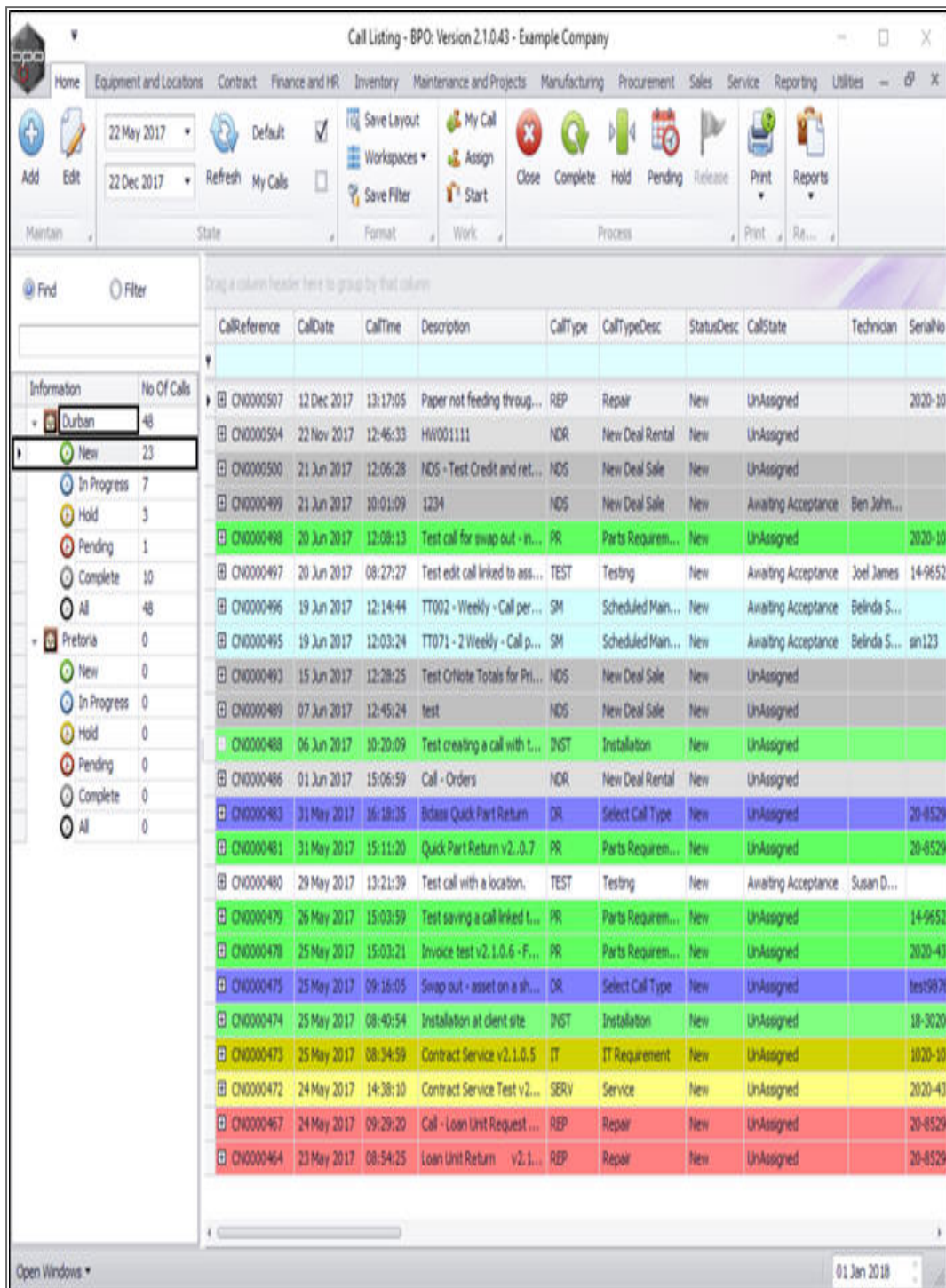
If you cannot link travel to the call due to the message: 'No items to select from', then an **Expense Allocation**, **Expense Type**, and Travel Rate must be configured.

Ribbon Access: *Service > Calls*



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**.



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

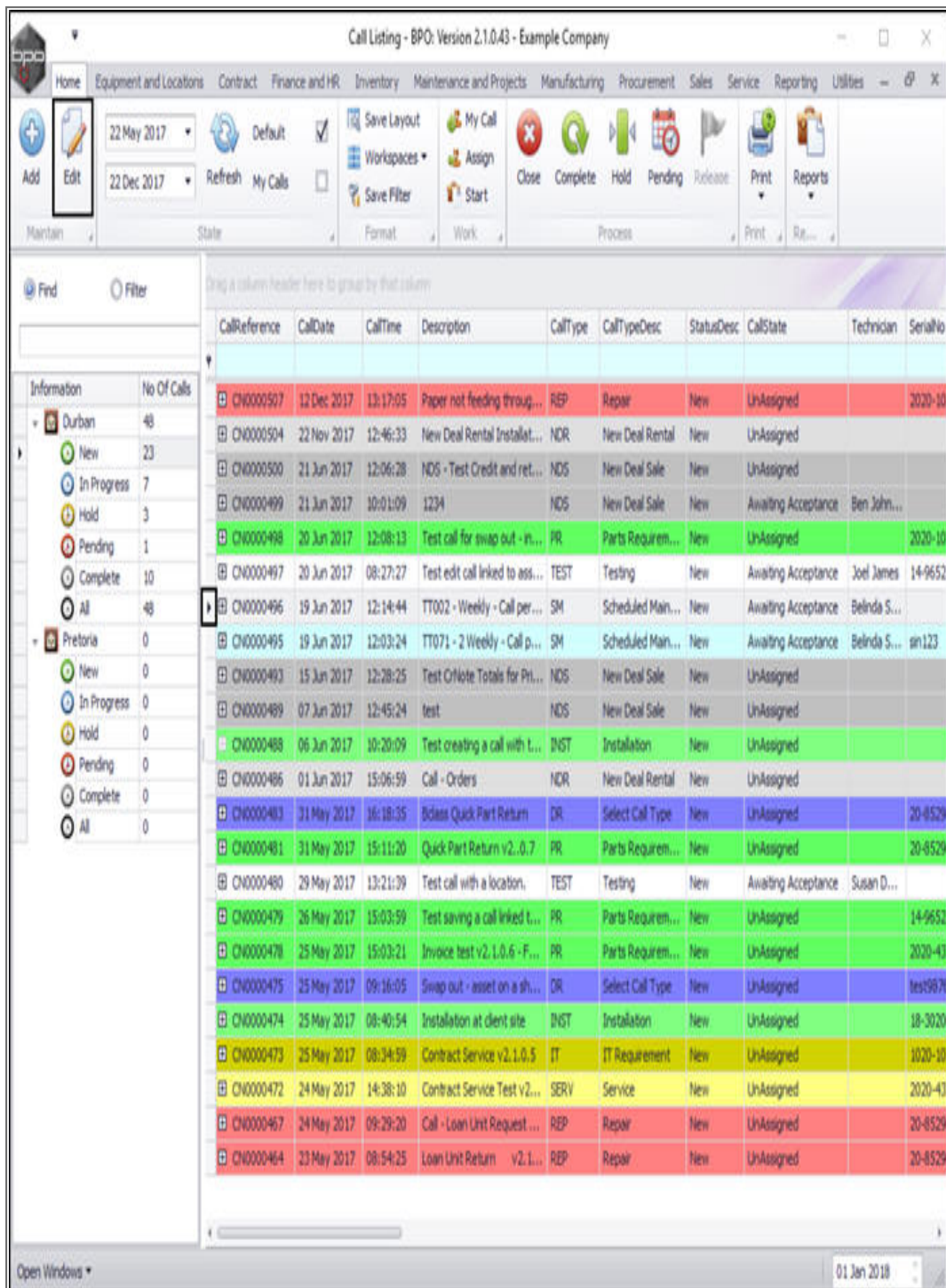
Information No Of Calls

- 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	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 ChRite 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

Open Windows 01 Jan 2018

- Click on the **row selector** in front of the **call** you wish to **log travel** 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

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Find Filter

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CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

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

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

Call maintenance : Call ref. : CN0000496 - 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

Work In Progress

Notes

Assignments

Hold History

Pending History

On Site Info

Meters

Open Windows

Customer: Hope Works

Contact: Mandy Jefferson

Contact No.: 031 555 1234

Address: Plot 91 Leaf Road
Forest Hills
New Town
Durban South

Call Type: Scheduled Maintenance

Error Code:

Description: TT002 - Weekly - Cal per WO

Call Date Time: 19 Jun 2017 12:14:44

Priority: 2

SLA: 0:00

Date Required: 19 Jun 2017

Order No:

Logged By: BancelD

Status: N - New

Optional No:

Relates To:

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Contract No	CO0000020
Location	Forest Hills Centre
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Closure Details:

Action:

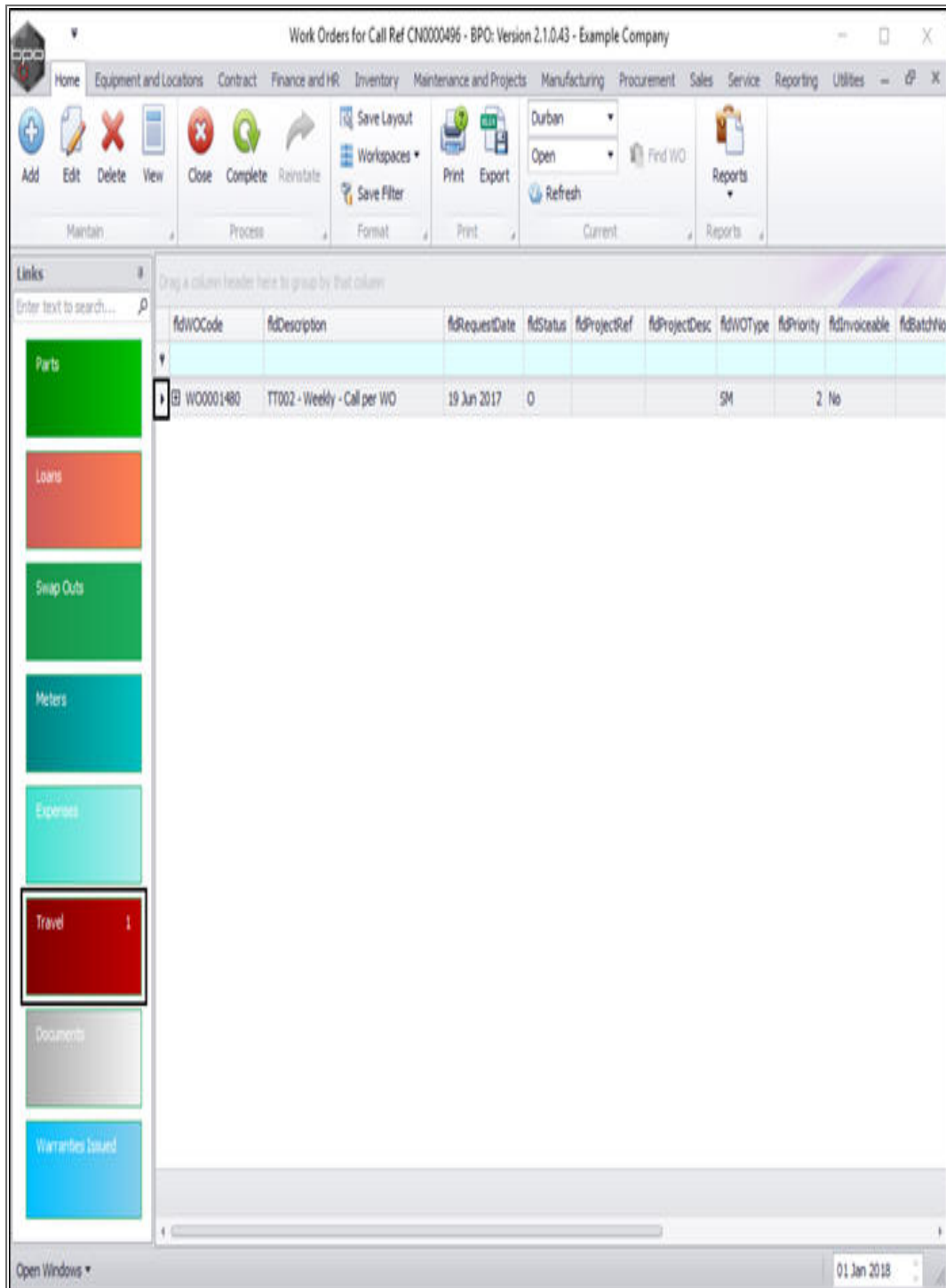
Closure Date Time: 00:00:00

Closed By:

01 Jan 2018

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

- Click on the **row selector** in front of the **work order** where you wish to **add travel** time.
- Click on the **Travel** tile.



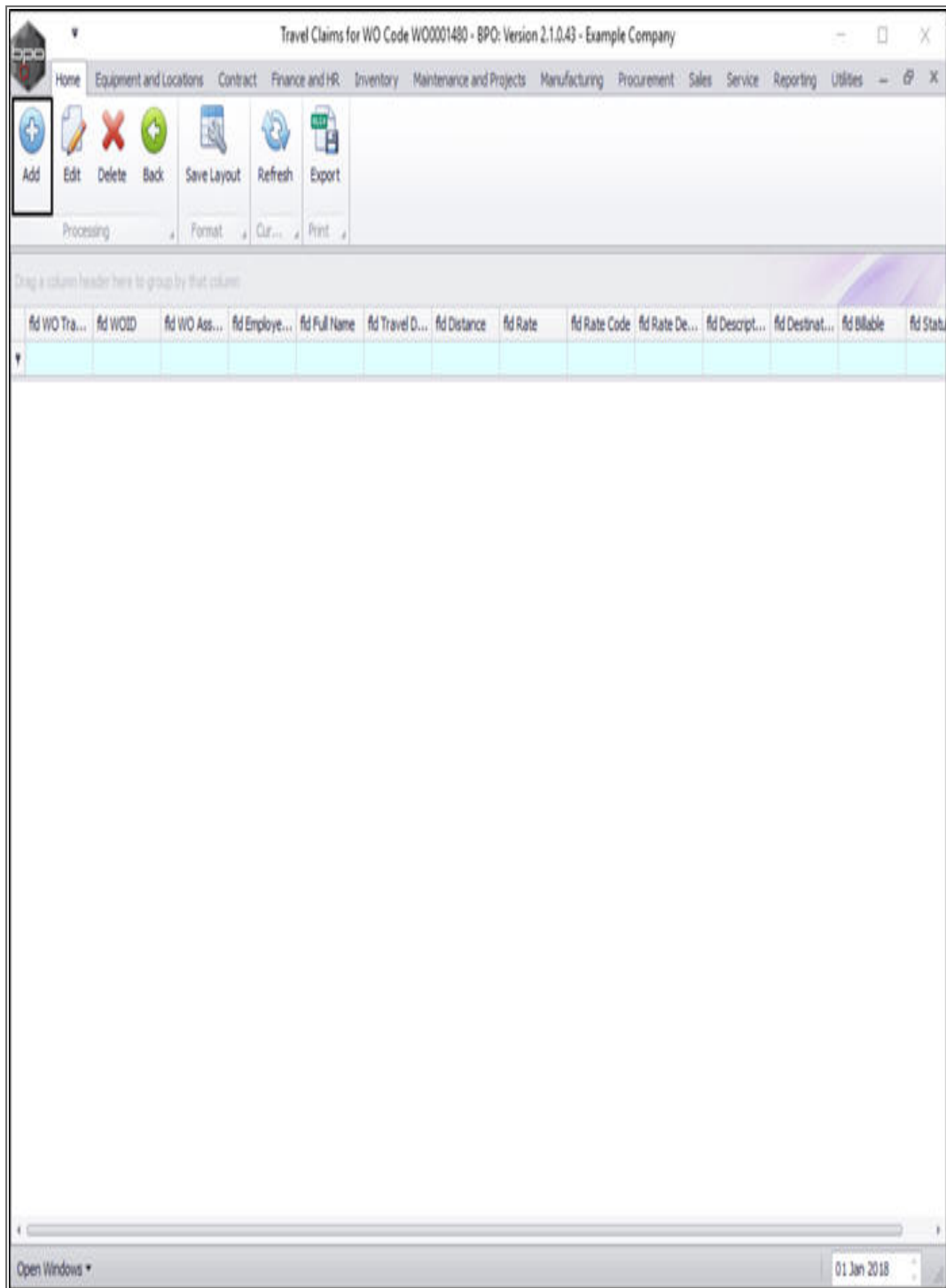
The screenshot shows the 'Work Orders for Call Ref CN000496 - BPO: Version 2.1.0.43 - Example Company' interface. The left sidebar contains several tiles: 'Parts' (green), 'Loans' (orange), 'Swap Outs' (green), 'Meters' (teal), 'Expenses' (light blue), 'Travel' (red, highlighted with a black border), 'Documents' (grey), and 'Warranties Issued' (blue). The main table displays a list of work orders. The first row is highlighted, showing the following data:

fdWOCODE	fdDescription	fdRequestDate	fdStatus	fdProjectRef	fdProjectDesc	fdWOType	fdPriority	fdInvoiceable	fdBatchNo
WO0001480	TT002 - Weekly - Call per WO	19 Jun 2017	O			SM	2	No	

The 'Travel' tile in the sidebar is highlighted with a black border, indicating it is the selected option for adding travel time to the selected work order.

The ***Travel Claims for WO Code []*** screen will be displayed.

- Click on **Add**.



Travel Claims for WO Code W00001480 - 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 Refresh Export

Processing Format Cur... Print

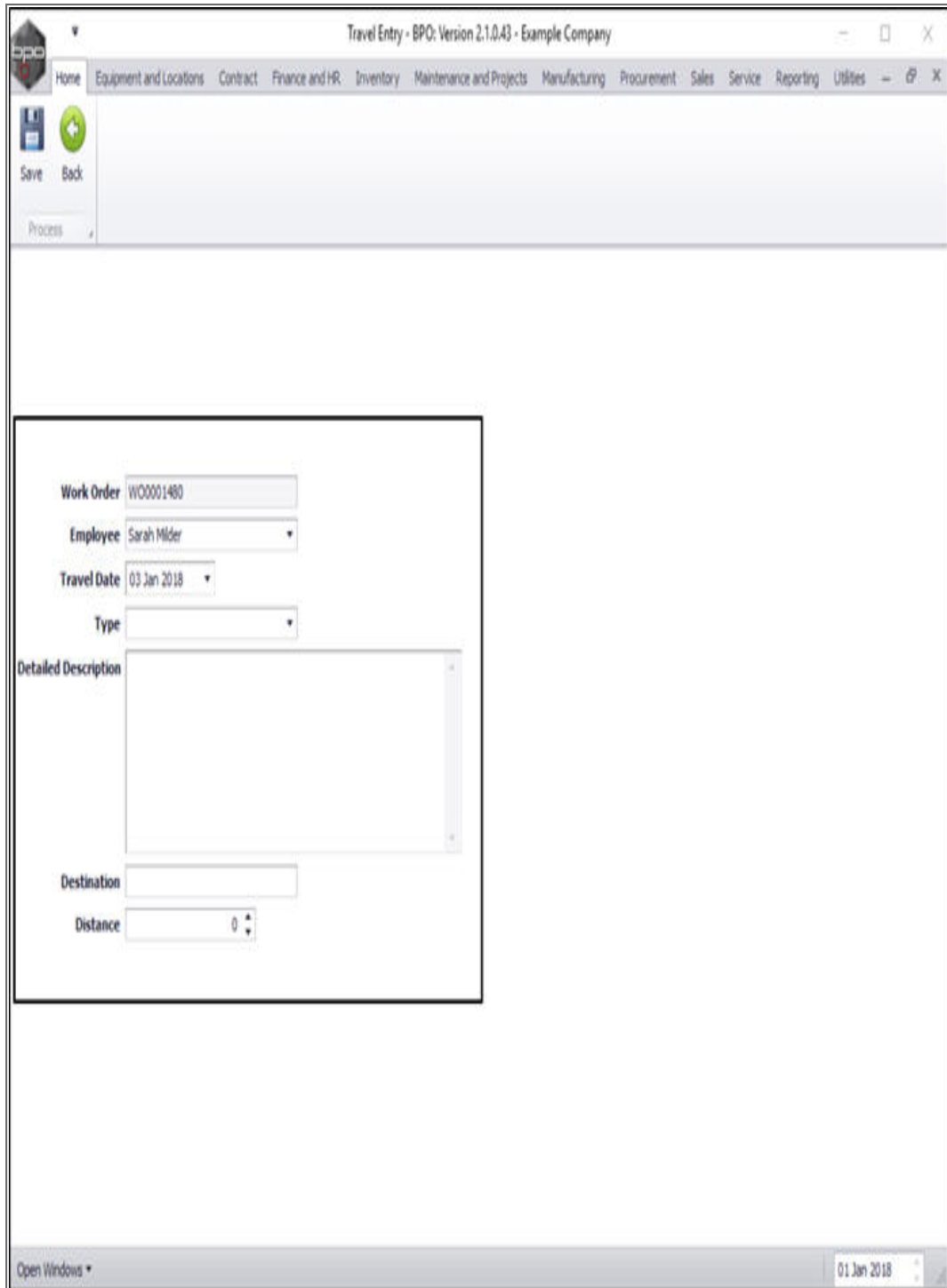
Drag a column header here to group by that column

fId WO Tra...	fId WOID	fId WO Ass...	fId Employee...	fId Full Name	fId Travel D...	fId Distance	fId Rate	fId Rate Code	fId Rate De...	fId Descript...	fId Destinat...	fId Billable	fId Statu...

Open Windows 01 Jan 2018

The **Travel 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.
- **Travel 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.
- **Type:** Click on the drop-down arrow and select the travel rate type e.g. Normal Travel Rate.
- **Detailed Description:** Type in a description / reason for the travel.
- **Destination:** Type in the area travelled to.
- **Distance:** Type in or use the arrow indicators to select the total amount of travel in km.
 - **Note:** Travel will not be billed from here, but by using **Travel Radii** instead.



Travel 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 WO0001480

Employee Sarah Milder

Travel Date 03 Jan 2018

Type

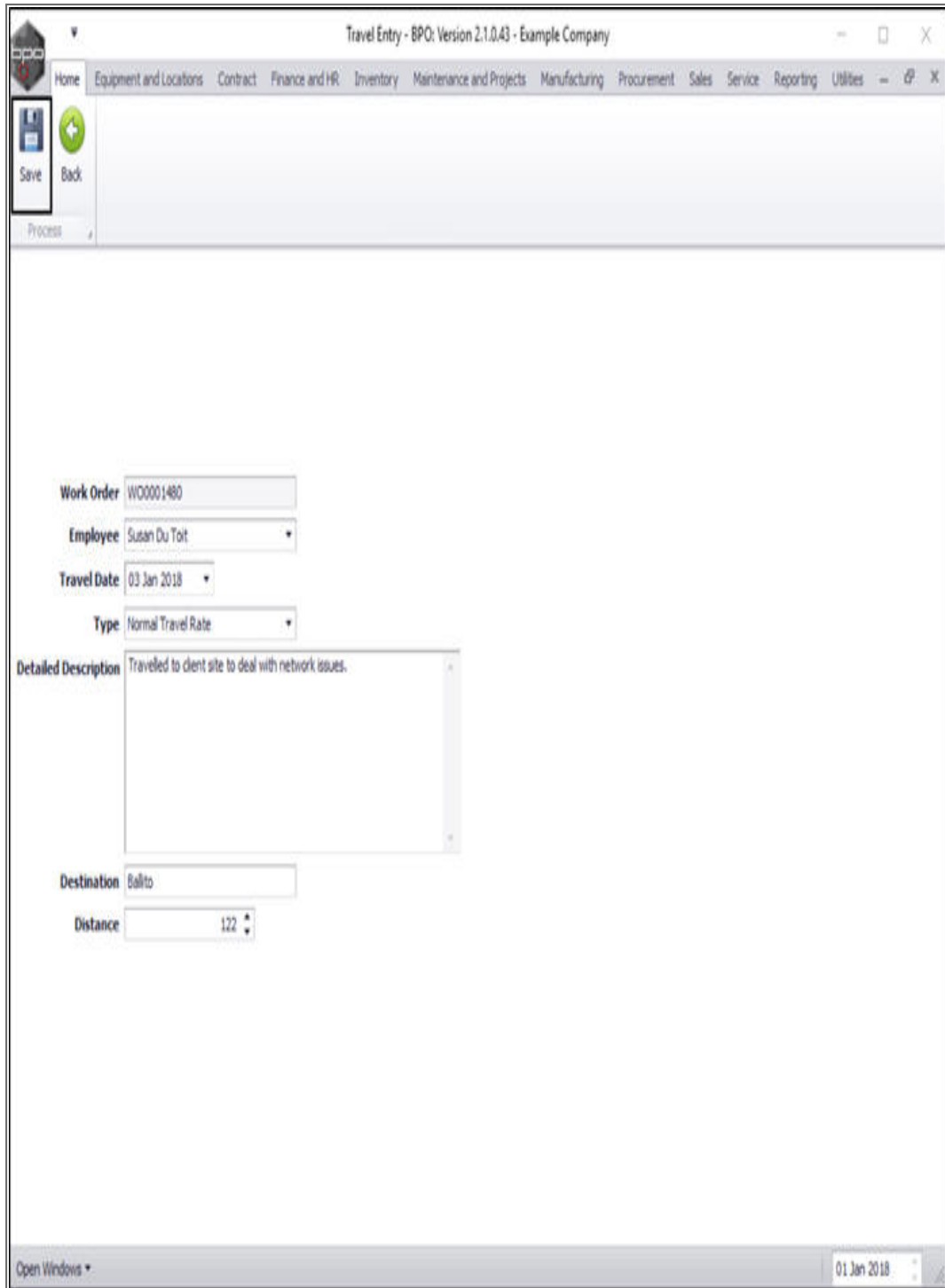
Detailed Description

Destination

Distance 0

Open Windows 01 Jan 2018

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



Travel 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 WO0001480

Employee Susan Du Toit

Travel Date 03 Jan 2018

Type Normal Travel Rate

Detailed Description Travelled to client site to deal with network issues.

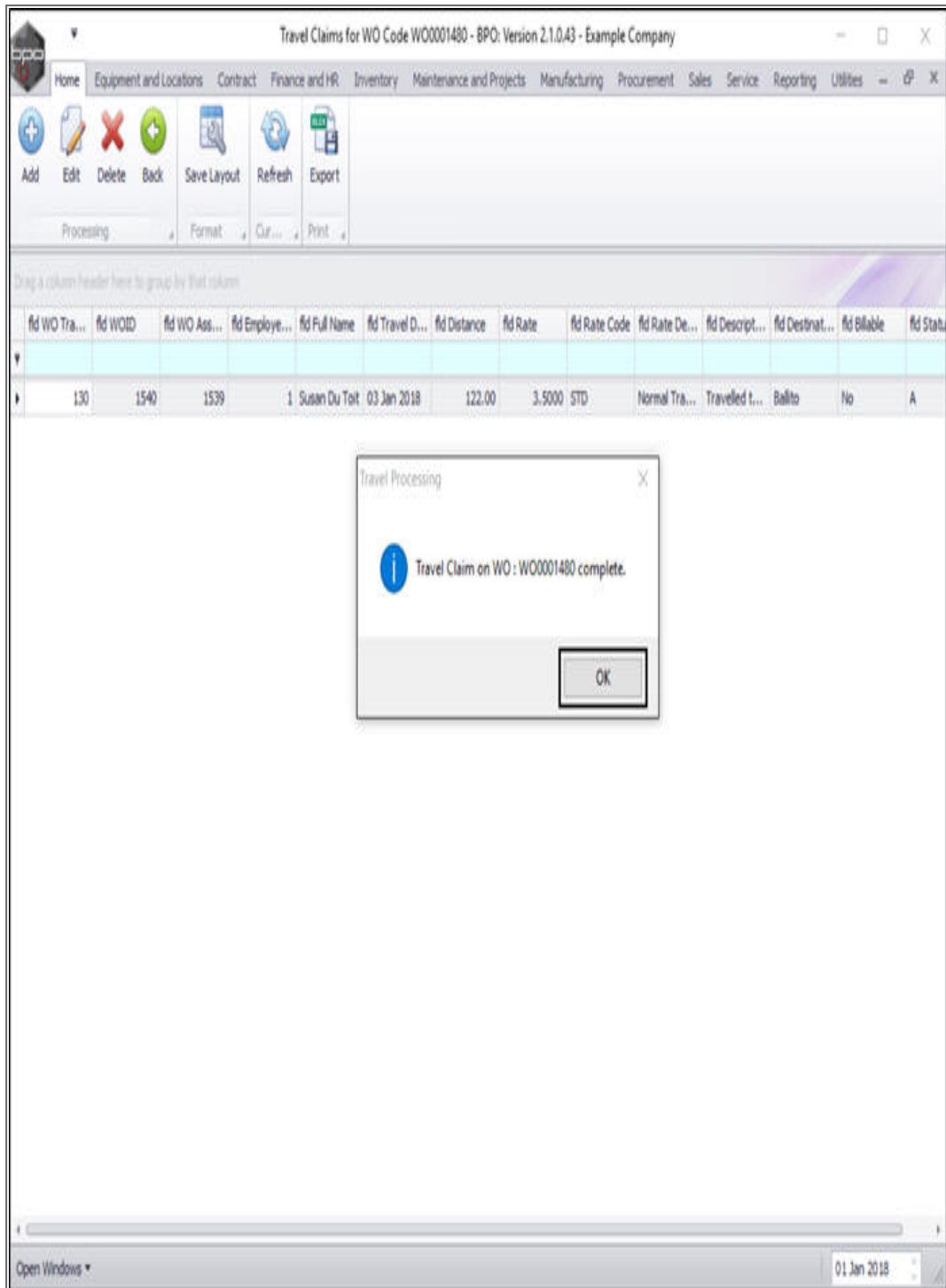
Destination Ballito

Distance 122

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- You will return to the **Travel Claims for WO Code []** screen.
- A **Travel Processing** message box will pop up informing you that;

- **Travel Claim on WO: [] complete.**
- Click on **OK**.



- You can now view the newly added travel claim in this screen.

Travel Claims for WO Code W00001480 - 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 Refresh Export

Processing Format Cur... Print

Drag a column header here to group by that column

Full Name	Travel Date	Distance	Rate	Rate Code	Rate Description	Description	Destination	Billable	Status
Susan Du Toit	03 Jan 2018	122.00	3.5000	STD	Normal Travel Rate	Travelled to client site to deal with network issues.	Ballito	No	A

Open Windows 01 Jan 2018

MNU.122.016

