

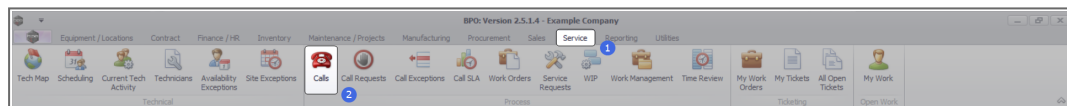
SERVICE

CALLS - CALL REPORT

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.

The **Call Report** returns the main call information as well as the call assignments and prior calls.

Ribbon Select *Service > Calls*



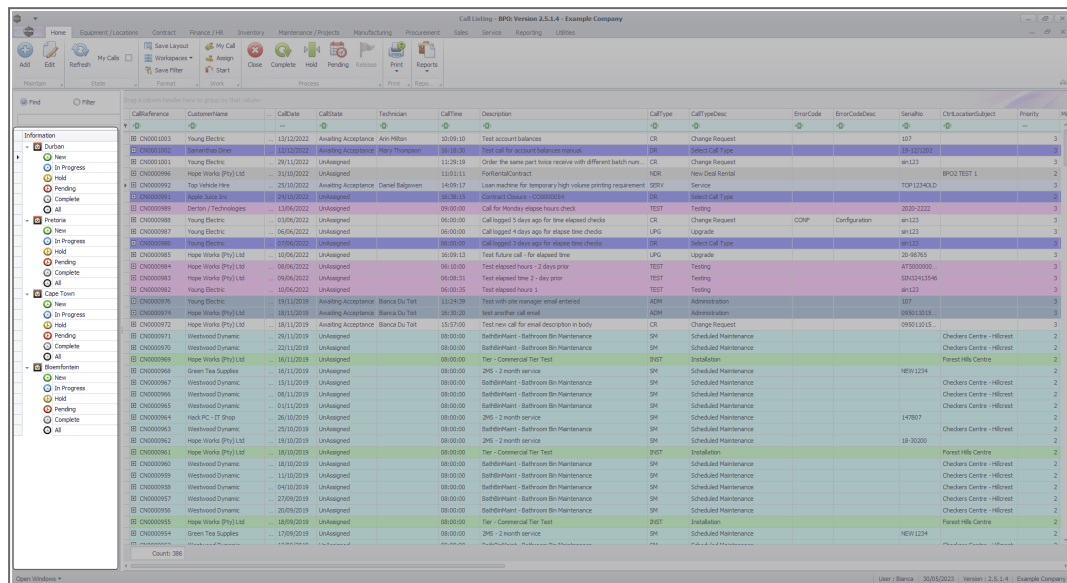
- The **Call Listing** screen will be displayed.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallPocDesc	ErrorCode	ErrorDesc	SerialNo	CtrLocationSubject	Priority
BT CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hillen	03:06:10	Test account balances	CR	Change Request			107		2
BT CH0001004	Young Electric	13/12/2022	Awaiting Acceptance	Nery Thompson	06:30:26	Test call for account balances manual	SM	Select Call Type			18-1212042		2
BT 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
BT CH0000996	Hope Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	FortifiedContract	NDR	New Deal Request				BPO2 TEST 1	2
BT CH0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Carol Balgoven	14:49:17	Loan machine for temporary high volume printing requirement	SRV	Service				TOP 1234OLD	3
BT CH0000994	Apple Juice Pty	24/10/2022	Unassigned		06:28:18	Contract Change - 200000000	SM	Select Call Type					3
BT CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BT CH0000988	Young Electric	03/06/2022	Unassigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BT CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BT CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 3 days ago for elapse time checks	SM	Select Call Type			an123		3
BT CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765		3
BT CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			473000000		3
BT CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:11	Test elapsed time 1 - day prior	TEST	Testing			02021412394		3
BT CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BT CH0000976	Young Electric	15/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		3
BT CH0000976	Hope Works (Pty) Ltd	16/11/2019	Awaiting Acceptance	Bianca Du Toit	06:26:28	Test another call email	ADM	Administration			999011015		3
BT 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			999011015		3
BT CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BT CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	SM5 - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BT CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000966	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000965	Westwood Dynamic	11/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	SM5 - 2 month service	SM	Scheduled Maintenance			147807		2
BT CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000962	Hope Works (Pty) Ltd	16/10/2019	Unassigned		08:00:00	SM5 - 2 month service	SM	Scheduled Maintenance					2
BT CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation			18-30300	Forest Hills Centre	2
BT CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000958	Westwood Dynamic	24/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BT CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	SM5 - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BT CH0000953	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	SM5 - 2 month service	SM	Scheduled Maintenance					2

¹BPO2 v2.5.1.3 or higher

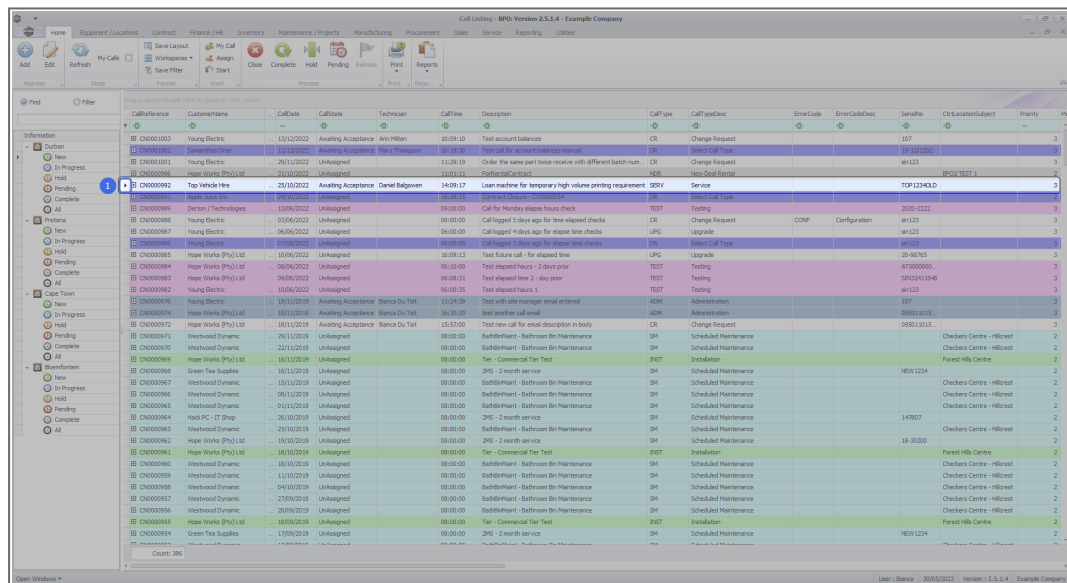
Calls - Call Report

- 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.



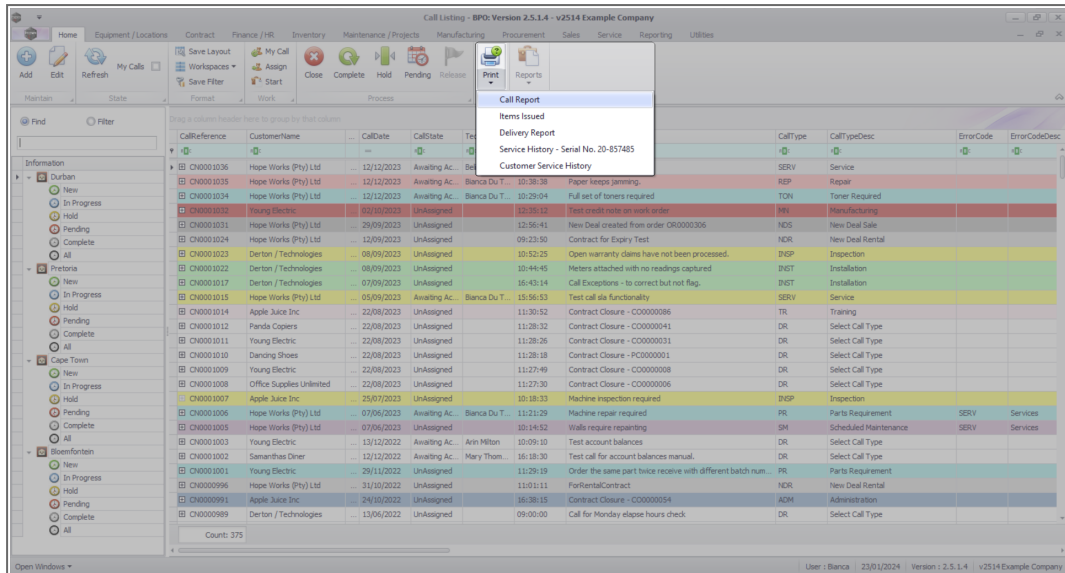
CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
CH0001003	Young Electric	13/12/2022	10:09:10	Ann Hilan	Test account balances	CR	Change Request			107		3
CH0001002	SeamlessDryer	12/12/2022	09:48:30	Mary Thompson	Test call for account balances manual	SR	Select Call Type			10-121202		3
CH0001001	Young Electric	20/12/2022	11:20:25		Order the new part from reserve with different batch num	CR	Change Request			an123		3
CH0000996	Hope Works (Pty) Ltd	31/10/2022	11:01:11		ForfeitureContract	NDR	New Deal Rental				BP02 TEST 1	2
CH0000992	Top Vehicle Hire	25/10/2022	14:09:17	Daniel Balgoven	Loan machine for temporary high volume printing requirement	SRV	Service			TOP123456		2
CH0000991	Adrian Sales Inc	24/10/2022	09:38:18		Contract Closure - CON000000	SR	Select Call Type					3
CH0000989	Derham Technologies	13/06/2022	09:00:00		Call for Monday elapse hours check	TEST	Testing			2025-2222		3
CH0000988	Young Electric	03/06/2022	06:00:00		Call logged 5 days ago for time elapsed checks	CR	Change Request	COMP	Configuration	an123		3
CH0000987	Young Electric	06/06/2022	06:00:00		Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
CH0000985	Young Electric	05/06/2022	06:00:00		Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
CH0000983	Hope Works (Pty) Ltd	05/06/2022	06:00:13		Test Future call - for elapsed time	UPG	Upgrade			20-98765		3
CH0000984	Hope Works (Pty) Ltd	06/06/2022	06:10:00		Test elapsed hours - 2 days prior	TEST	Testing			AT000000		3
CH0000983	Hope Works (Pty) Ltd	06/06/2022	06:08:31		Test elapsed time 2 - day prior	TEST	Testing			0302412546		3
CH0000982	Young Electric	06/06/2022	06:00:35		Test elapsed hours 1	TEST	Testing			an123		3
CH0000976	Young Electric	18/11/2019	11:24:30		Test with site manager email entered	ADM	Administration			107		3
CH0000974	Hope Works (Pty) Ltd	18/11/2019	06:30:20		test another call email	ADM	Administration			99901015		3
CH0000972	Hope Works (Pty) Ltd	18/11/2019	15:27:00		Test new call for email description in body	CR	Change Request			99901015		3
CH0000971	Westwood Dynamic	22/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000970	Westwood Dynamic	22/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000969	Hope Works (Pty) Ltd	16/11/2019	09:00:00		Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CH0000968	Green Tea Supplies	15/11/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
CH0000967	Westwood Dynamic	15/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000966	Westwood Dynamic	08/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000965	Westwood Dynamic	01/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000964	Hack PC - IT Shop	26/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			147807		2
CH0000963	Westwood Dynamic	25/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
CH0000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00		Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CH0000960	Westwood Dynamic	18/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000959	Westwood Dynamic	11/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000958	Westwood Dynamic	04/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000957	Westwood Dynamic	27/09/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000956	Westwood Dynamic	20/09/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00		Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CH0000954	Green Tea Supplies	17/09/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

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



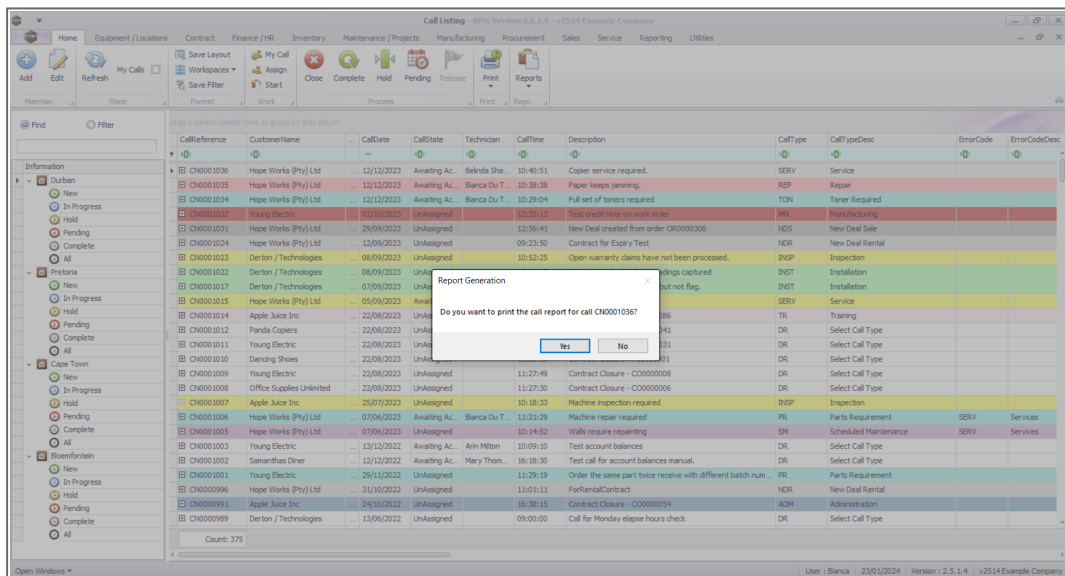
CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
CH0001003	Young Electric	13/12/2022	10:09:10	Ann Hilan	Test account balances	CR	Change Request			107		3
CH0001002	SeamlessDryer	12/12/2022	09:48:30	Mary Thompson	Test call for account balances manual	SR	Select Call Type			10-121202		3
CH0001001	Young Electric	20/12/2022	11:20:25		Order the new part from reserve with different batch num	CR	Change Request			an123		3
CH0000996	Hope Works (Pty) Ltd	31/10/2022	11:01:11		ForfeitureContract	NDR	New Deal Rental				BP02 TEST 1	2
CH0000992	Top Vehicle Hire	25/10/2022	14:09:17	Daniel Balgoven	Loan machine for temporary high volume printing requirement	SRV	Service			TOP123456		2
CH0000991	Adrian Sales Inc	24/10/2022	09:38:18		Contract Closure - CON000000	SR	Select Call Type					3
CH0000989	Derham Technologies	13/06/2022	09:00:00		Call for Monday elapse hours check	TEST	Testing			2025-2222		3
CH0000988	Young Electric	03/06/2022	06:00:00		Call logged 5 days ago for time elapsed checks	CR	Change Request	COMP	Configuration	an123		3
CH0000987	Young Electric	06/06/2022	06:00:00		Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
CH0000985	Young Electric	05/06/2022	06:00:00		Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
CH0000983	Hope Works (Pty) Ltd	05/06/2022	06:00:13		Test Future call - for elapsed time	UPG	Upgrade			20-98765		3
CH0000984	Hope Works (Pty) Ltd	06/06/2022	06:10:00		Test elapsed hours - 2 days prior	TEST	Testing			AT000000		3
CH0000983	Hope Works (Pty) Ltd	06/06/2022	06:08:31		Test elapsed time 2 - day prior	TEST	Testing			0302412546		3
CH0000982	Young Electric	06/06/2022	06:00:35		Test elapsed hours 1	TEST	Testing			an123		3
CH0000976	Young Electric	18/11/2019	11:24:30		Test with site manager email entered	ADM	Administration			107		3
CH0000974	Hope Works (Pty) Ltd	18/11/2019	06:30:20		test another call email	ADM	Administration			99901015		3
CH0000972	Hope Works (Pty) Ltd	18/11/2019	15:27:00		Test new call for email description in body	CR	Change Request			99901015		3
CH0000971	Westwood Dynamic	22/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000970	Westwood Dynamic	22/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000969	Hope Works (Pty) Ltd	16/11/2019	09:00:00		Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CH0000968	Green Tea Supplies	15/11/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
CH0000967	Westwood Dynamic	15/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000966	Westwood Dynamic	08/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000965	Westwood Dynamic	01/11/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000964	Hack PC - IT Shop	26/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			147807		2
CH0000963	Westwood Dynamic	25/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
CH0000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00		Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CH0000960	Westwood Dynamic	18/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000959	Westwood Dynamic	11/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000958	Westwood Dynamic	04/10/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000957	Westwood Dynamic	27/09/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000956	Westwood Dynamic	20/09/2019	08:00:00		SubStation - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
CH0000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00		Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CH0000954	Green Tea Supplies	17/09/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Print** button to display a list of **Report Options**.
- Click on **Call Report**.



The screenshot shows the 'Call Listing' application interface. A dropdown menu is open over the 'Reports' button, showing options: 'Items Issued', 'Delivery Report', 'Service History - Serial No. 20-857485', and 'Customer Service History'. The main table displays a list of calls with columns: CallReference, CustomerName, CallDate, CallState, Technician, CallTime, Description, CallType, CallTypeDesc, ErrorCode, and ErrorCodeDesc. The table is filtered by 'Durban' and 'New' status, showing 375 records.

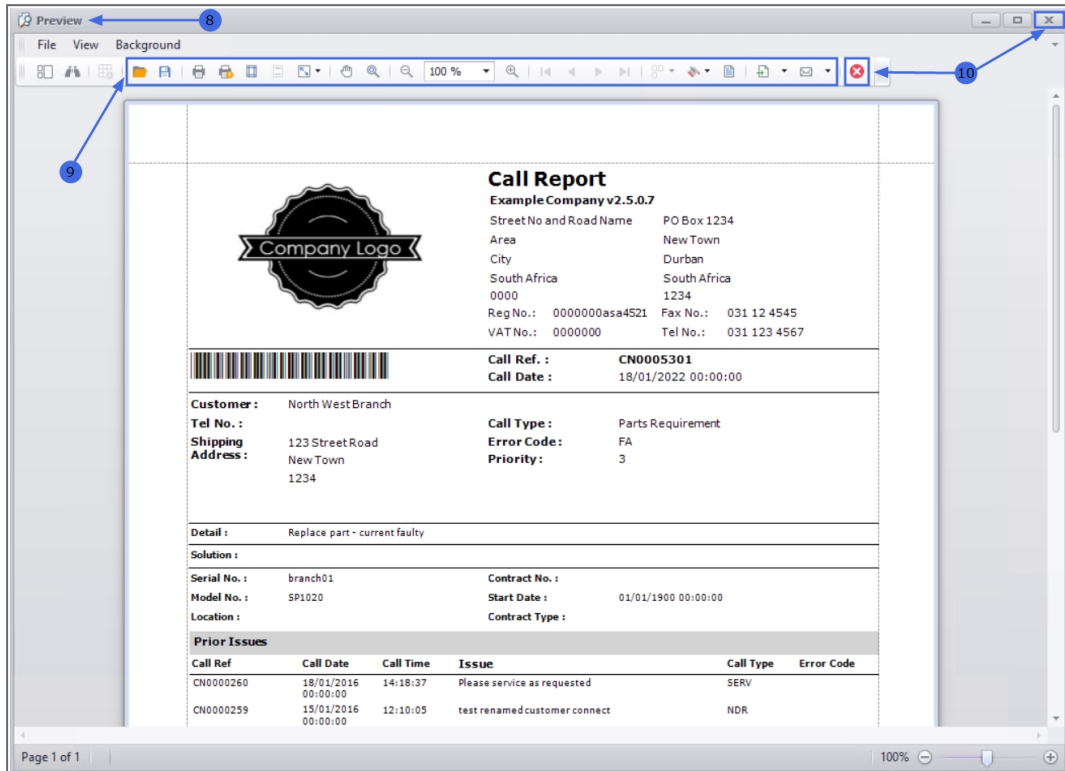
- When you receive the **Report Generation** message to confirm;
 - **Do you want to print the call report for call CN[num-ber]?**
- Click on **Yes**.



The screenshot shows the same 'Call Listing' application interface, but with a 'Report Generation' dialog box open. The dialog box asks: 'Do you want to print the call report for call CN00010367?'. It has 'Yes' and 'No' buttons. The background table is the same as in the previous screenshot.

- The selected Report will display in the Reports **Preview** screen.

- From this screen you can make cosmetic changes to the document, as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email** the Call Report.
- Close the **Preview** screen when done.



The screenshot shows a 'Preview' window for a 'Call Report'. The window has a menu bar with 'File', 'View', and 'Background'. A toolbar contains various icons for editing and saving. Callout 8 points to the 'Background' menu, callout 9 points to the 'File' menu, and callout 10 points to the 'Close' button (X icon) in the window's title bar.

Call Report
Example Company v2.5.0.7

Street No and Road Name: PO Box 1234
 Area: New Town
 City: Durban
 South Africa: South Africa
 0000: 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Call Ref.: CN0005301
Call Date: 18/01/2022 00:00:00

Customer: North West Branch
Tel No.:
Shipping Address: 123 Street Road
 New Town
 1234

Call Type: Parts Requirement
Error Code: FA
Priority: 3

Detail: Replace part - current faulty

Solution:

Serial No.: branch01
Model No.: SP1020
Location:

Contract No.:
Start Date: 01/01/1900 00:00:00
Contract Type:

Prior Issues

Call Ref	Call Date	Call Time	Issue	Call Type	Error Code
CN0000260	18/01/2016 00:00:00	14:18:37	Please service as requested	SERV	
CN0000259	15/01/2016 00:00:00	12:10:05	test renamed customer connect	NDR	

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