

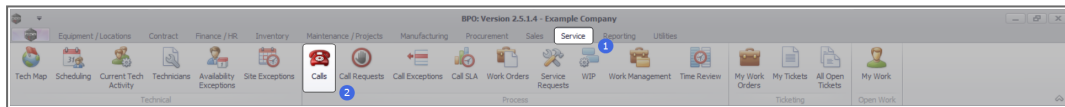
SERVICE

CALLS – SALES ORDER

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.

After a quote for additional work on a call has been **approved** by the client - this quote will need to be converted to a **Sales Order** to start the procurement process for the parts or services.

Ribbon Select *Service > Calls*



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

¹BPO2 v2.5.1.3 or higher

Call Listing - BPO 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	Salemshire Drive	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	BPO2 TEST 1	3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	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 - C00000594	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		09:00:00	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			20-46765		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	20/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	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 - Hilson	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	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 - Hilson	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 - Hilson	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	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 - BPO 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	Salemshire Drive	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	BPO2 TEST 1	3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	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 - C00000594	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		09:00:00	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			20-46765		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	20/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	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 - Hilson	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	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 - Hilson	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 - Hilson	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilson	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

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

Call Listing - BPO Version 2.5.1.4 - Example Company

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			an123		3
BI CH0001002	Sawmills Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	09:38:20	Test call for account balance manual	SR	Select Call Type			BP-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 - C00000059	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		09:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/06/2022	Unassigned		09:00:00	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			20-96765		3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:10:00	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			57021413546		3
BI CH0000982	Young Electric	10/06/2022	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	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095011015		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			095011015		3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000955	Hope Works (Pty) Ltd	16/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

- Click on the **Edit** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

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			an123		3
BI CH0001002	Sawmills Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	09:38:20	Test call for account balance manual	SR	Select Call Type			BP-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	Awaiting Acceptance	Daniel Balgoveen	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 - C00000059	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		09:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/06/2022	Unassigned		09:00:00	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			20-96765		3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:10:00	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			57021413546		3
BI CH0000982	Young Electric	10/06/2022	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	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095011015		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			095011015		3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000955	Hope Works (Pty) Ltd	16/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

- The **Call maintenance : Call ref. - [call ref number]** screen will be displayed.
- Click on the **Orders** tile.

Call maintenance : Call ref. - CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / 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...

Time Review

Processing

Quotes

Orders

Invoices

Credit Notes

Meters

Open Windows

Customer: Big Bargains

Contact: Tarryn Snow CUSTOMER CONTAI

Contact No.: 031 123 4567

Address: 29 Dune Ave
New Town
Durban

Call Type: Implementation

Error Code:

Description: B6004

Call Date Time: 04/04/2022 12:25:17

Priority: 2

SLA: 0.00

Date Required: 11/04/2022

Order No: OR0000336

Logged By: JulandaK

Status: N - New

Optional No:

Relates To :

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Call Request Reference	
Contract No	
Location	Hillcrest
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	OR0000336

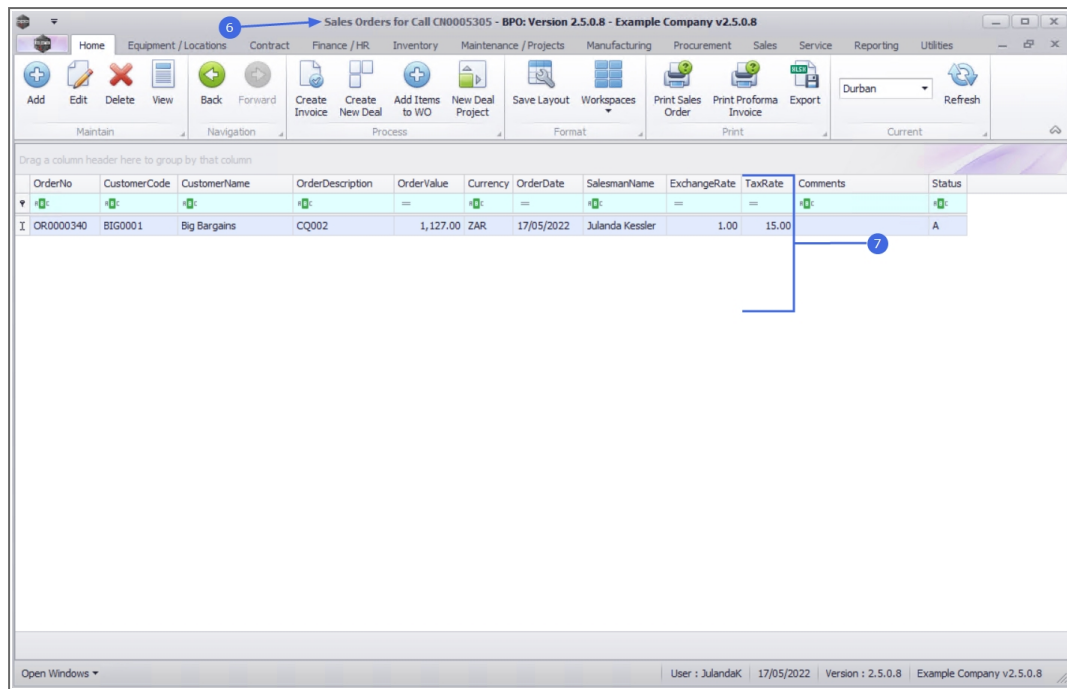
Prior Calls :

CallReference	CallDate	CallTime	Description
---------------	----------	----------	-------------

User : JulandaK | 17/05/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

SALES ORDER LISTING

- The **Sales Quotes for Call** [call ref number] screen will be displayed.
- Any orders that have already been added for the call, will be listed on this screen.

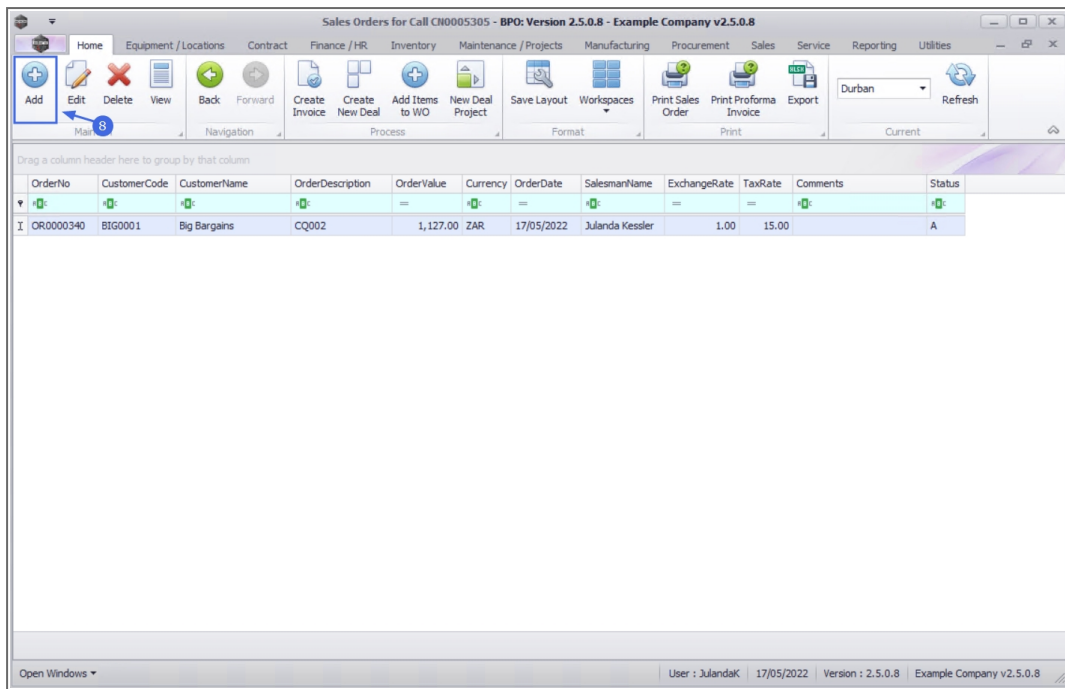


ADD SALES ORDER

- Click on **Add**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	Comments	Status
I	OR0000340	BTG0001	Big Bargains	CQ002	1,127.00	ZAR	17/05/2022	Julanda Kessler	1.00	15.00	A

- "The Add new Customer Order screen will be displayed. " on page 2
- Complete the **Sales Order Header** and the **Financial Header** Information.
- Confirm the **Billing and Shipping Addresses** for the customer, if these fields were not auto populated when you entered the order header information.

9 → Add new Customer Order - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Delete Item Save Layout Print Sales Order Print Proforma Invoice

Maintain Format Print

Customer Name: Big Bargains
 Contact Name: Tarryn Snow CUSTOMER CONTACT
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Big Bargains
 Order Currency: South African Rand
 Tax Rate: 15.00

Reference: S0004
 Status: N
 Order Date & Time: 17/05/2022 14:51:06
 Billing Contact:
 Exchange Rate: 1

Billing address:
 PO Box 1985
 New Town

Shipping address:
 29 Dune Ave
 New Town
 Durban

Addresses Related References

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPri
	Internal S...	CALL	Call Out Fee	Call Out Fee		1.000	0.000		0.000	0.000	0.000	250.000	250
	Labour	ITTECH	IT Technician	IT Technician		1.000	0.000		0.000	0.000	0.000	177.000	177
	Travel	100	Travel not excee...	Travel not exceeding...		1.000	0.000		0.000	0.000	0.000	350.000	350
	Select typ...												

Comment:

Sub Total: 777.00
 VAT: 116.55
 Grand Total: 893.55

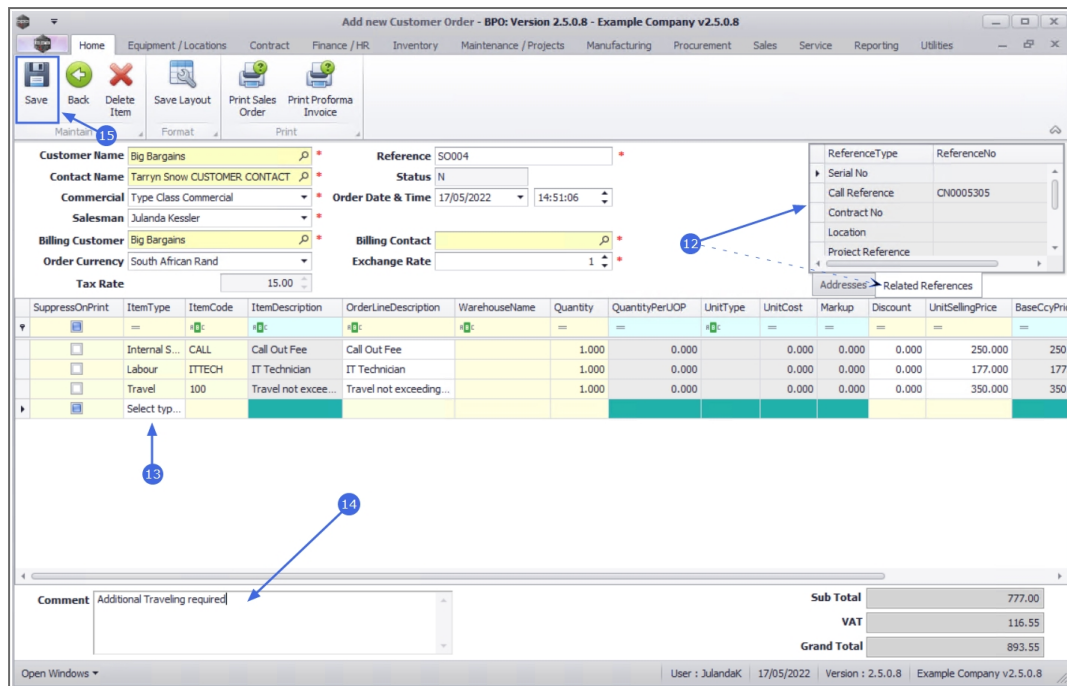
Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

RELATED REFERENCES

- Click on the **Related References** tab to link the reference information for the customer Order.

LINE ITEMS AND COMMENTS

- "Add Sales Order Items" on page 11 as required.
- Click in the **Comments text box** to type a comment related to the Order.
- Click on **Save** to save the customer Order.



- The **Sales Orders for Customer** listing screen will be updated with the new Order that you have created.

For a detailed handling of this topic refer to **Orders - Add Sales Order**

EDIT SALES ORDER

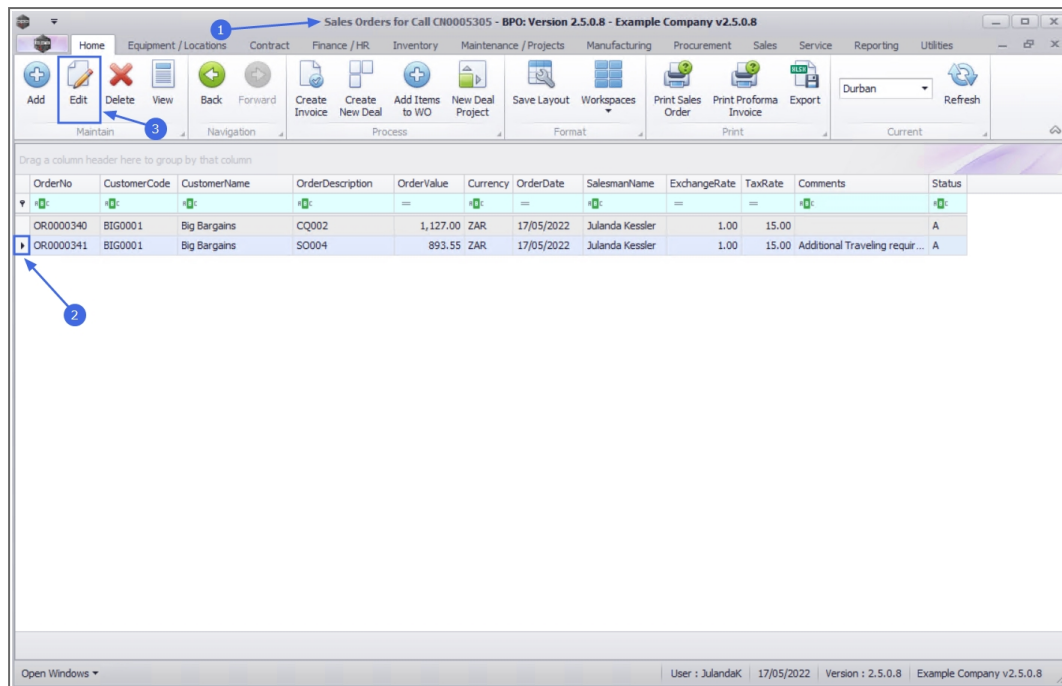


Sales Orders that have already been invoiced will **not** be available for editing.

- From the **Sales Orders for Call [call ref number]** screen,
- Click in the **row** of the Sales Order you wish to edit.
- Click on **Edit**.



Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.



- The **Edit Customer Order - [Order Number]** listing screen will display.
- Make the required changes to the **Heading Information**, **Addresses** or **Related References tabs**.
- Make the necessary changes to the Order Item frame:
 - To "**Add Sales Order Items**" on page 11, click in the Item Type column of the next available row.
 - To "**Delete Item line entry**" on page 8, click on the **row** of the item you wish to remove, then click on **Delete Item**.
- Click on **Save** to save the changes to the Customer Order and return to the **Sales Orders for Customer** screen.

For a detailed handling of this topic refer to [Orders - Edit Sales Order](#)

4 → Edit Customer Order - ORD000341 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Delete Item Save Layout Print Sales Order Print Proforma Invoice

Customer Name: Big Bargains Reference: SO004
 Contact Name: Tarryn Snow CUSTOMER CONTACT Status: N
 Commercial: Type Class Commercial Order Date & Time: 17/05/2022 14:51:06
 Salesman: Julanda Kessler Billing Contact: Tarryn Snow CUSTOMER CONTACT
 Billing Customer: Big Bargains Exchange Rate: 1
 Order Currency: South African Rand Tax Rate: 15.00

Billing address: PO Box 1985 New Town
 Shipping address: 29 Dune Ave New Town Durban

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPri
	Internal S...	CALL	Call Out Fee	Call Out Fee		1.000	0.000	0.000	0.000	0.000	0.000	250.000	250
	Labour	ITTECH	IT Technician	IT Technician		1.000	0.000	0.000	0.000	0.000	0.000	177.000	177
	Travel	100	Travel not excee...	Travel not exceeding...		1.000	0.000	0.000	0.000	0.000	0.000	350.000	350
	Select typ...												

Comment: Additional Traveling required

Sub Total: 777.00
 VAT: 116.55
 Grand Total: 893.55

Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

DELETE SALES ORDER



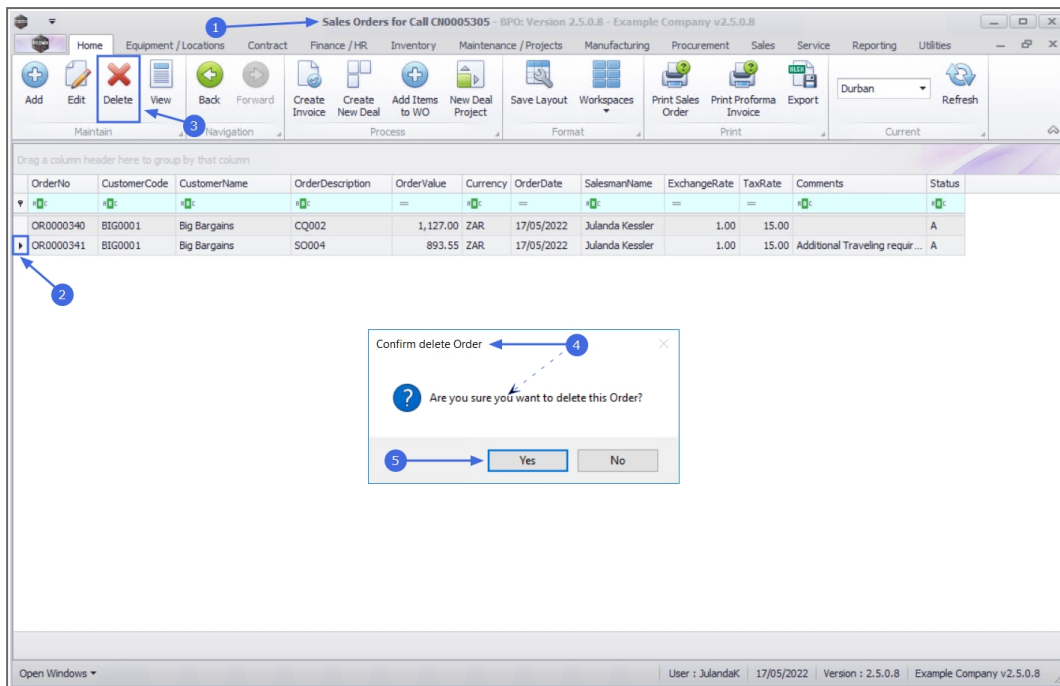
Orders that have already been invoiced will **not** be available for deletion.

- From the **Sales Orders for Call** [call ref number] screen,
- Click on to the **row** of the Sales Order you wish to **remove**.
- Click on **Delete**.



Short cut key: Right click to display the **All groups** menu list. Click on **Delete**.

- The **Confirm delete Order** message will display;
 - **Are you sure you want to delete this Order?**
- Click on **Yes**.



The Sales Order will be **removed** from the **Sales Orders for Customer** listing screen.



For a detailed handling of this topic refer to [Orders - Delete Sales Order](#)

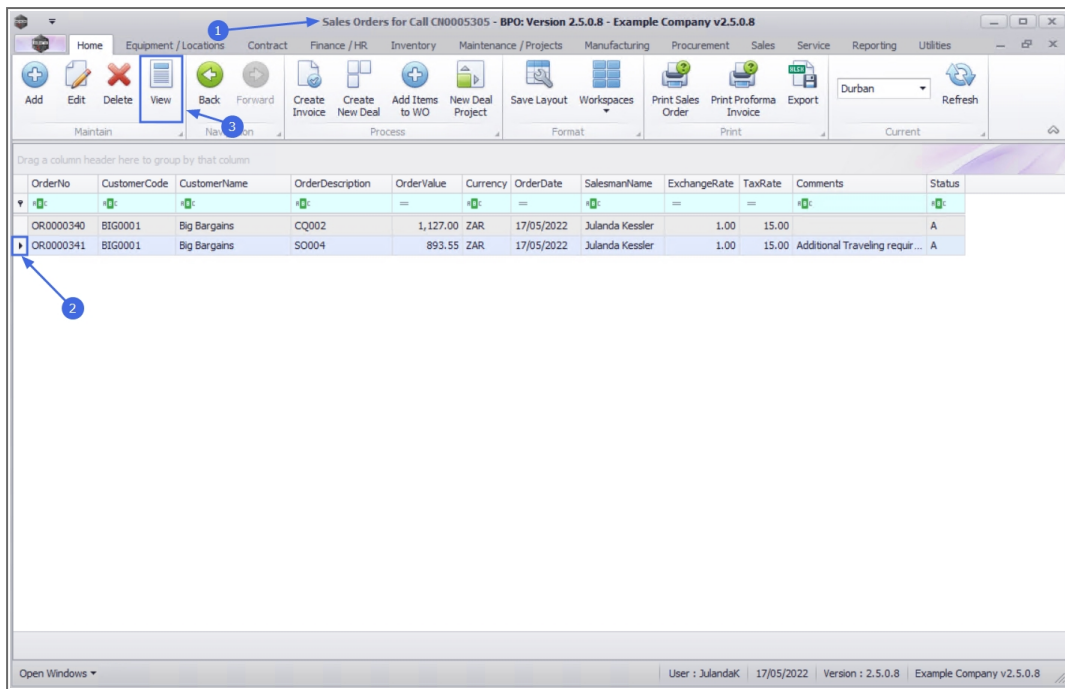
VIEW SALES ORDER

An Order can be **viewed** in **any** status.

- From the **Sales Orders for Call** [call ref number] screen,
- Click on the **row** of the Sales Order that you wish to **view**.
- Click on **View**.



Short cut key: Right click to display the **All groups** menu list. Click on **View**.



- The **View Customer Order - [Order Number]** screen will display.



No changes can be made to the information on the Order as this is a **view only** screen.

- You can **"Print Sales Order / Print Proforma Invoice"** on page 24 from this screen.
- Click **Back** to return to the **Sales Orders for Work Order** screen.

View Customer Order - OR0000341 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Back Save Layout Print Sales Order Print Proforma Invoice

Customer Name: Big Bargains
Contact Name: Tarryn Snow
Commercial Type Class: ITTECH
Salesman: Julanda K
Billing Customer: Big Bargains
Order Currency: South African Rand
Tax Rate: 15.00

SO004
N
17/05/2022 14:51:06

Billing address: PO Box 1985, New Town
Shipping address: 29 Dune Ave, New Town, Durban

Billing Contact: Tarryn Snow CUSTOMER CONTACT
Exchange Rate: 1

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPri
No	SERV	CALL	Call Out Fee	Call Out Fee		1.000	0.000	0.000	0.000	0.000	0.000	250.000	250
No	CRFT	ITTECH	IT Technician	IT Technician		1.000	0.000	0.000	0.000	0.000	0.000	177.000	177
No	TRVL	100	Travel not excee...	Travel not exceeding...		1.000	0.000	0.000	0.000	0.000	0.000	350.000	350

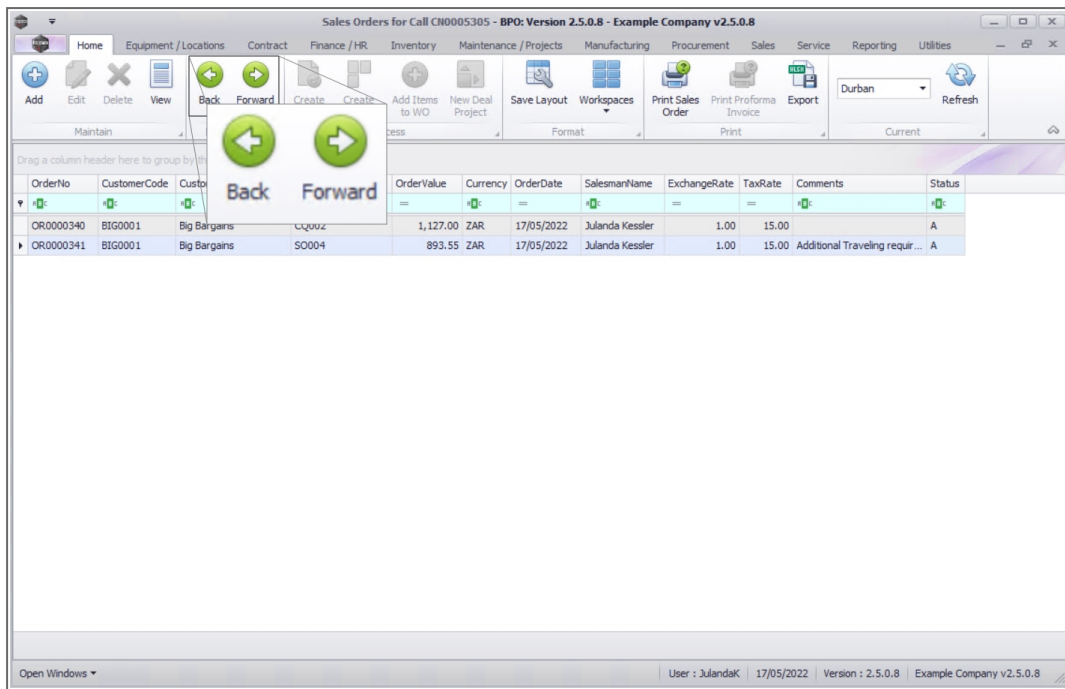
Comment: Additional Traveling required

Sub Total: 777.00
VAT: 116.55
Grand Total: 893.55

Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

NAVIGATION BUTTONS

- The **Forward** navigation button allows for quick navigation to related documentation, by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The **Back** navigation button will transport you back to the **Work Order Listing** screen.

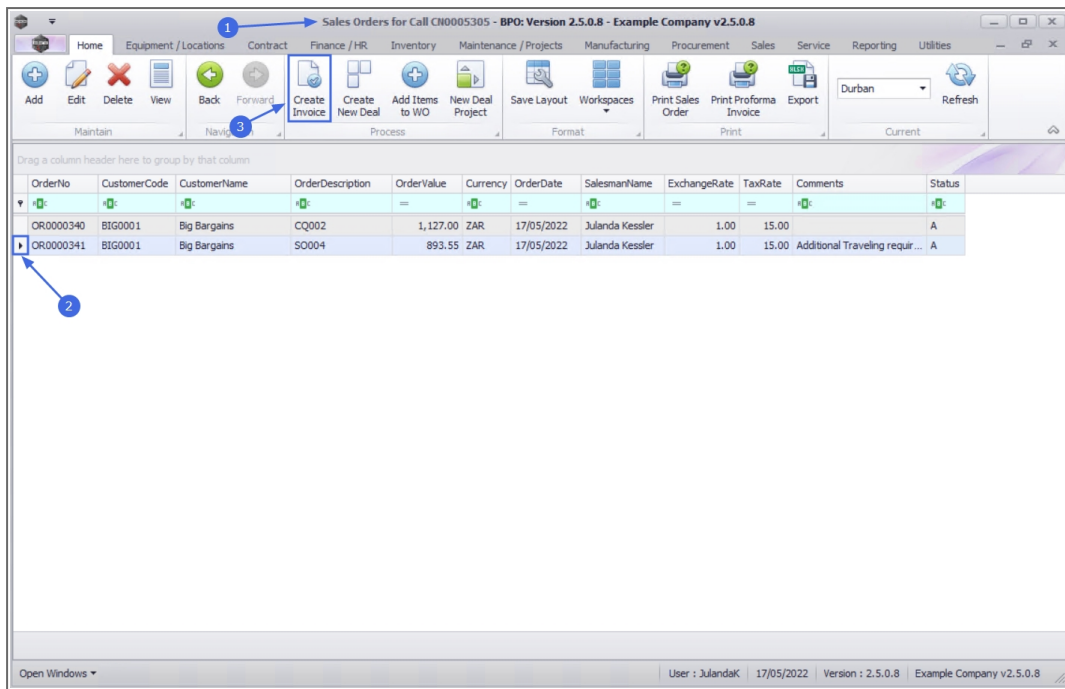


CREATE INVOICE

- From the *Sales Orders for Call* [call ref number] screen,
- Select the **row** of the Sales Order you wish to **create an invoice** for.
- Click on **Create Invoice**.

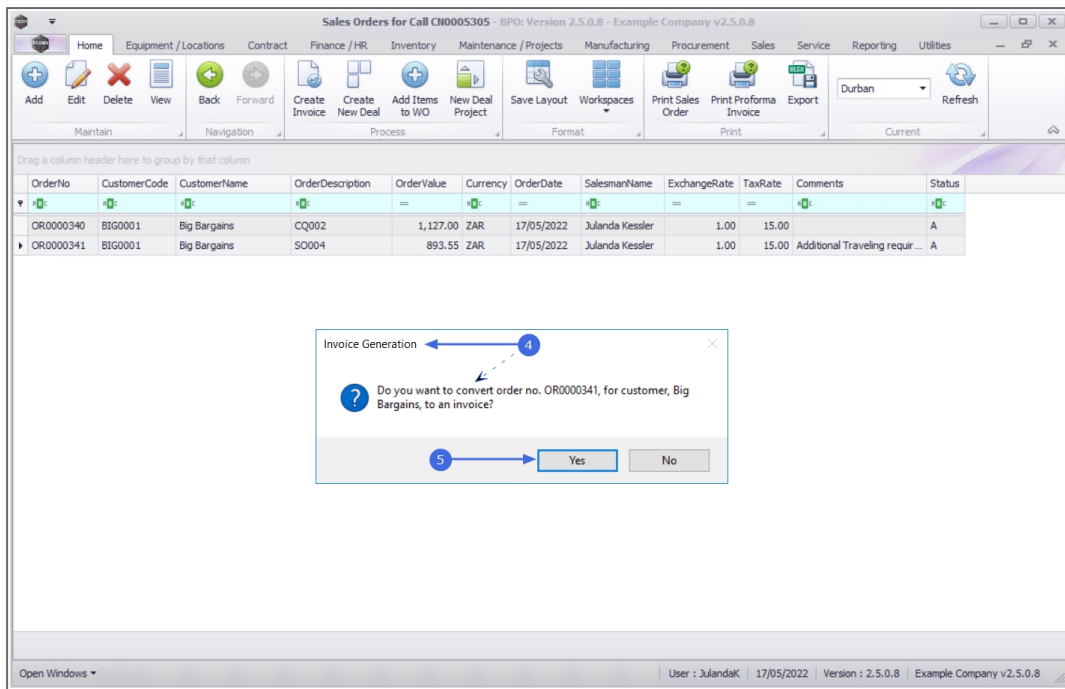


Short cut key: Right click to display the *All groups* menu list. Click on *Invoice*.

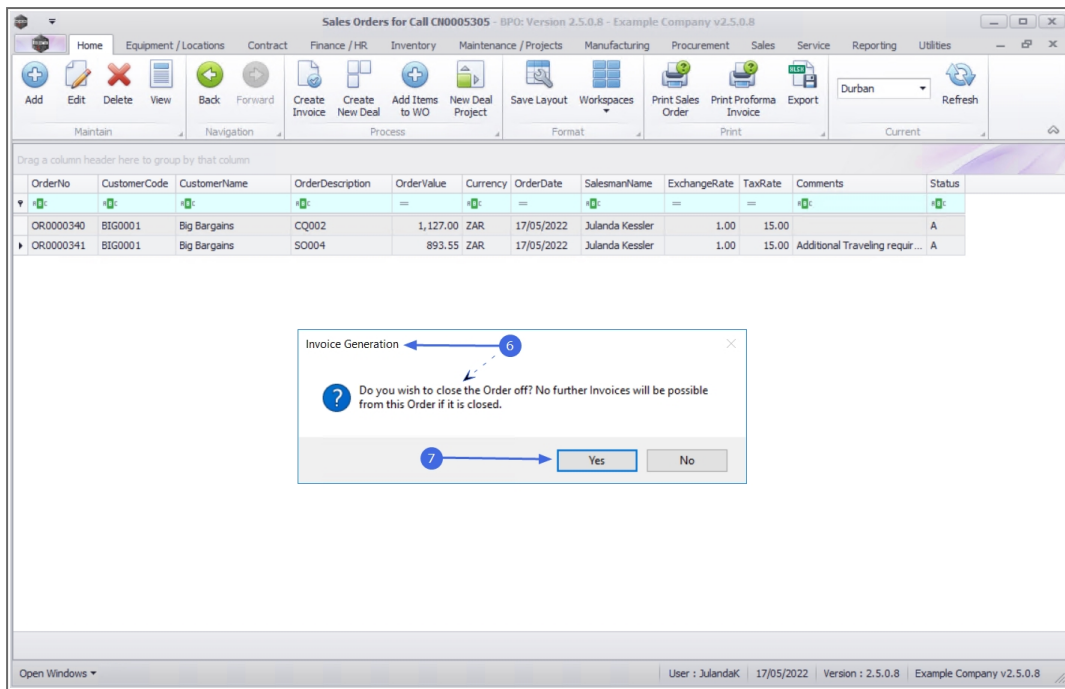


You will receive three (3) **Invoice Generation** messages:

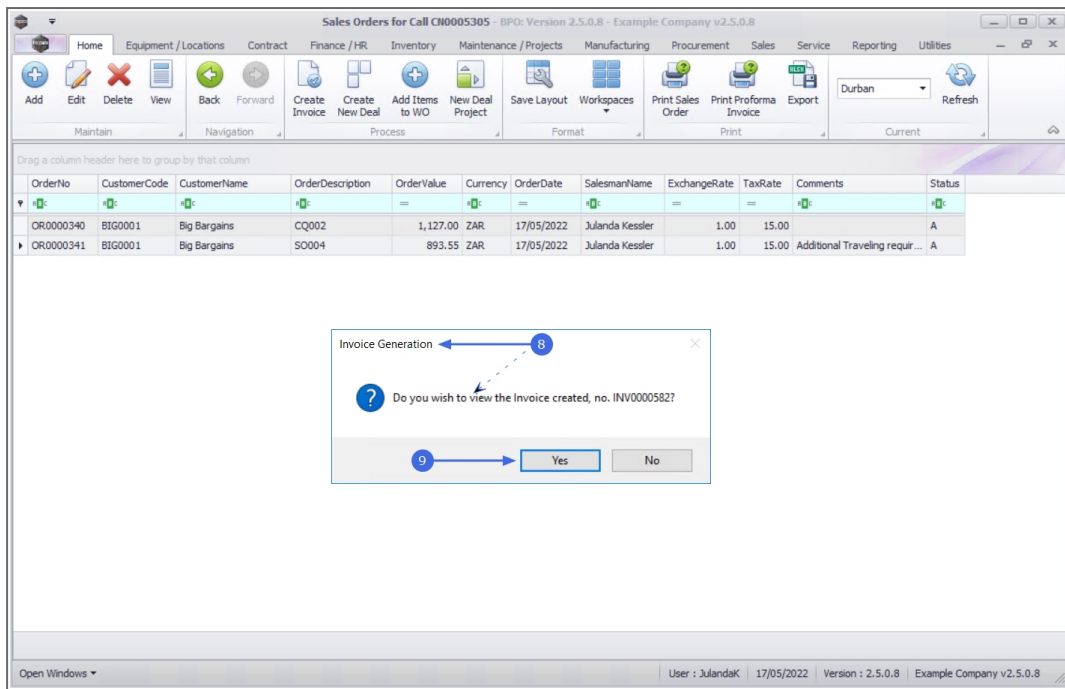
- The first **Invoice Generation** message will confirm;
 - Do you want to convert order no. [order number], for customer, [customer code], to an invoice?**
- Click on **Yes**.



- The second **Invoice Generation** message will confirm;
 - **Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.**
- Click on **Yes**.



- When you receive the third **Invoice Generation** message to confirm;
 - **Do you wish to view the Invoice created, no [invoice number]?**
- Click on **Yes** to view the Invoice.
 - Click on **No** to return to the **Sales Orders for Customer** screen.



- The **Edit Customer Invoice** screen will display where you can view or make changes to the Invoice, if required.
- After making the necessary changes, click on **Save**.



For a detailed handling of this topic refer to Orders - Convert to Sales Invoice

10 → Edit Customer Invoice - INV0000582 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Delete Item Save Layout Maintain Format

Customer Name: Big Bargains
 Contact Name: Tarryn Snow CUSTOMER CONTACT
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Big Bargains
 Invoice Currency: South African Rand
 Tax Rate: 15.00

Reference: SO004
 Status: New
 Date & Time: 17/05/2022 15:37:06
 Billing Contact: Tarryn Snow CUSTOMER CONTACT
 Exchange Rate: 1

Billing address: PO Box 1985 New Town
 Shipping address: 29 Dune Ave New Town Durban

☐ Suppress Line Detail on Print

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
	Internal Service	CALL	Call Out Fee	Call Out Fee			1.000	0.000	0.000	0.000	250.000	250.000	15
	Labour	ITTECH	IT Technician	IT Technician			1.000	0.000	0.000	0.000	177.000	177.000	15
	Travel	100	Travel not excee...	Travel not exceeding 1...			1.000	0.000	0.000	0.000	350.000	350.000	15
	Select type...												

Comment: Additional Traveling required

Sub Total: 777.00
 VAT: 116.55
 Grand Total: 893.55

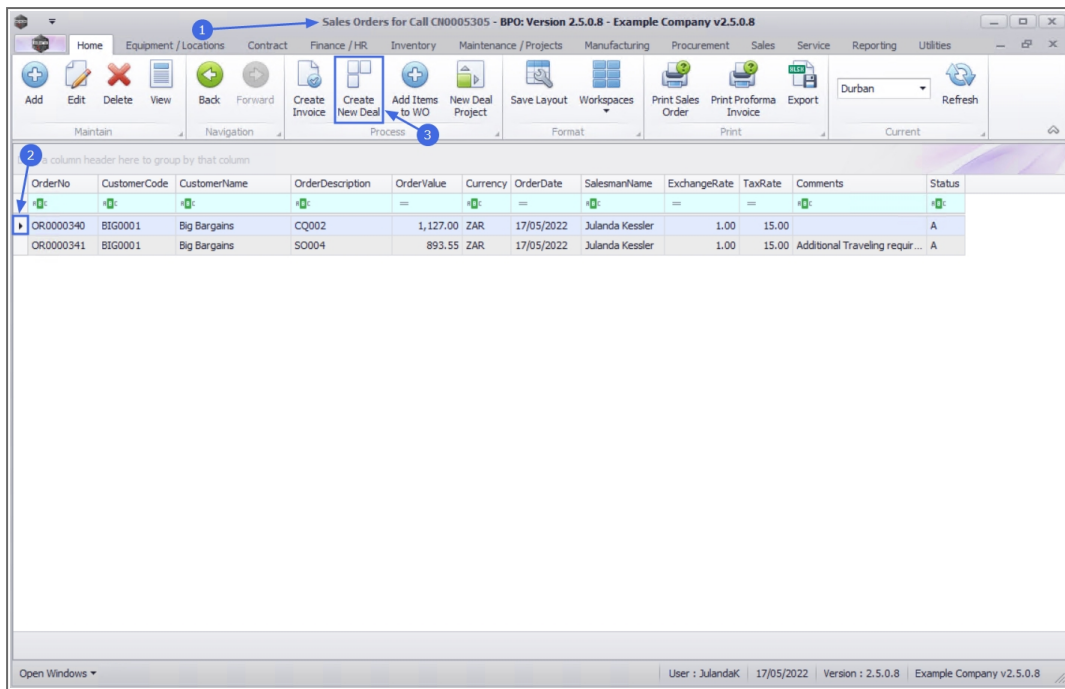
Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

CREATE NEW DEAL

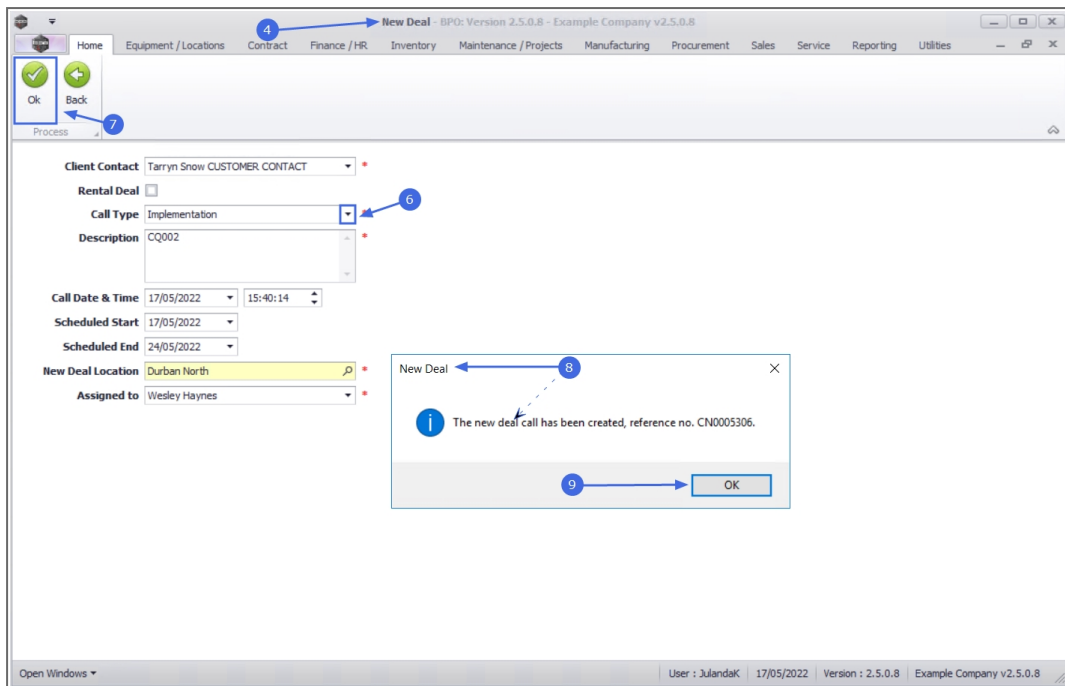
- From the **Sales Orders for Call** [call ref number] screen,
- Select the **row** of the Sales Order you wish to create a New Deal for.
- Click on **Create New Deal**.



Short cut key: Right click to display the **All groups** menu list. Click on **New Deal**.



- "The New Deal screen will be displayed." on page 3
- Complete the New Deal information as required.
- The **Call Type** field enables you to distinguish if this order is a New Deal Sale or New Deal Rental.
- When you have completed the new deal information, click on **OK**.
- When you receive the **New Deal** message to confirm that;
 - *The new deal call has been created, reference no. [reference number]*
- Click on **OK**.



- You will return to the **Sales Orders** screen.



For a detailed handling of this topic refer to [Orders - Convert to New Deal Sale / Rental](#)

ADD ITEMS TO WORK ORDER

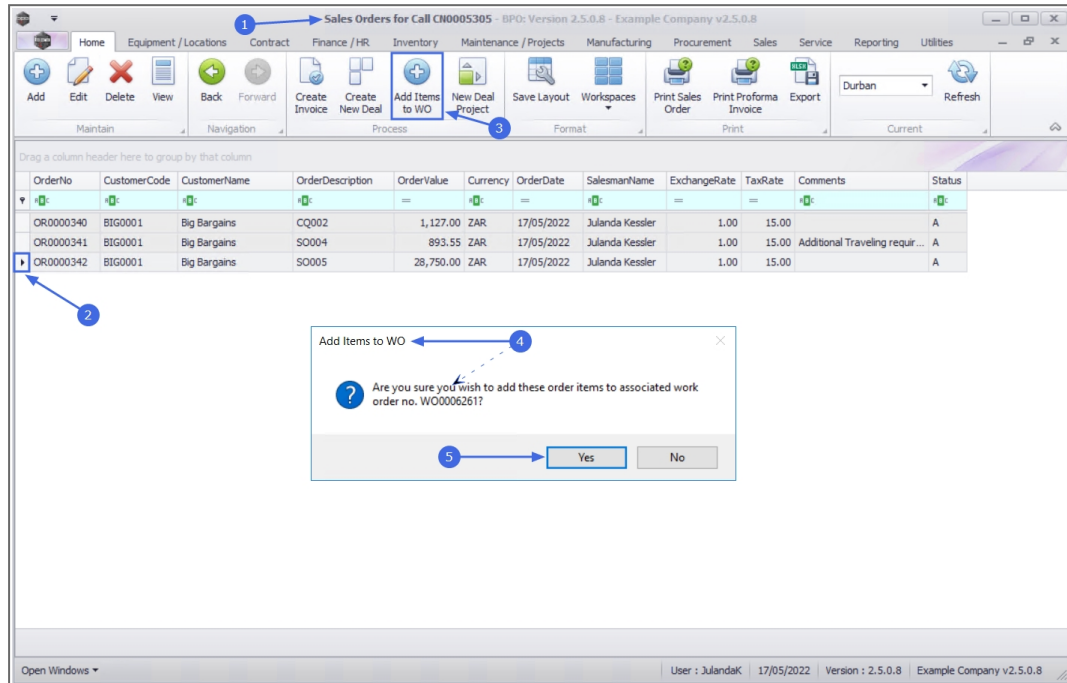
The **Add Items to WO** function is only valid where the Customer Order has been linked to an existing Work Order.

- From the **Sales Orders for Call [call ref number]** screen,
- Select the **row** of the Sales Order you wish to add items to.
- Click on **Add Items to WO**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add Items**.

- When you receive the **Add Items to WO** message to confirm;
 - **Are you sure you wish to add these order items to associated work order no [work order number]?**
- Click on **Yes**.



- You will return to the **Sales Orders for Work Order** screen.
- The Work Order items will have been added to the Sales Order.



For a detailed handling of this topic refer to [Orders - Add Items to Work Order](#)

NEW DEAL PROJECT

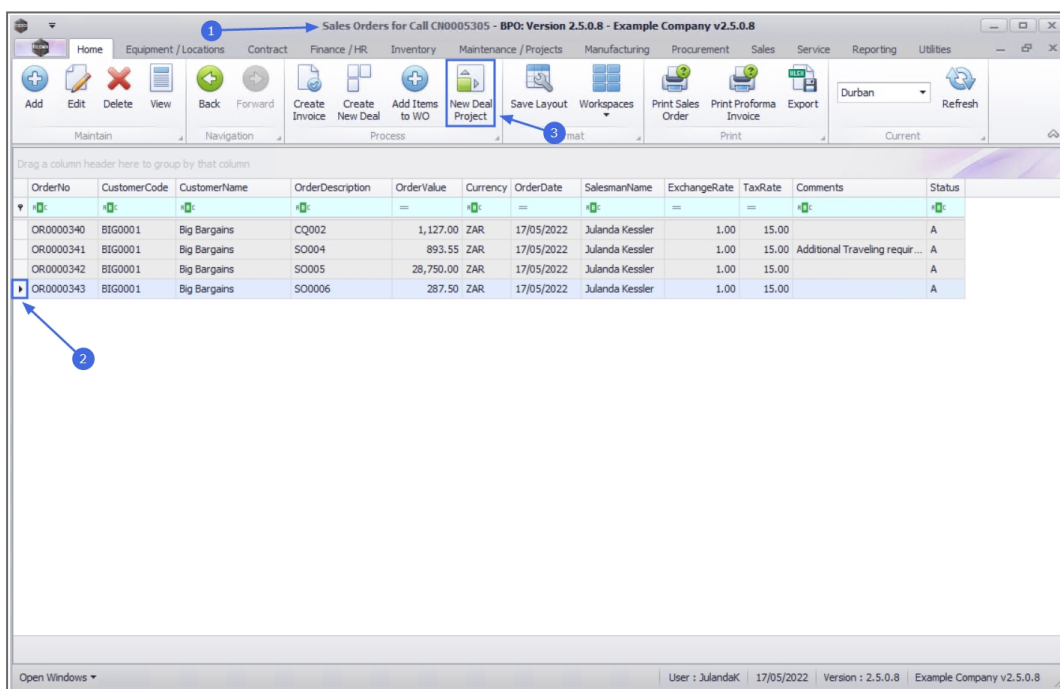
- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.

- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing screen.

- From the **Sales Orders for Customer [Customer Code]** screen,
- Click on the **row** of the **Sales Order** you wish to convert to a New Deal Project.
- Click on **New Deal Project**.

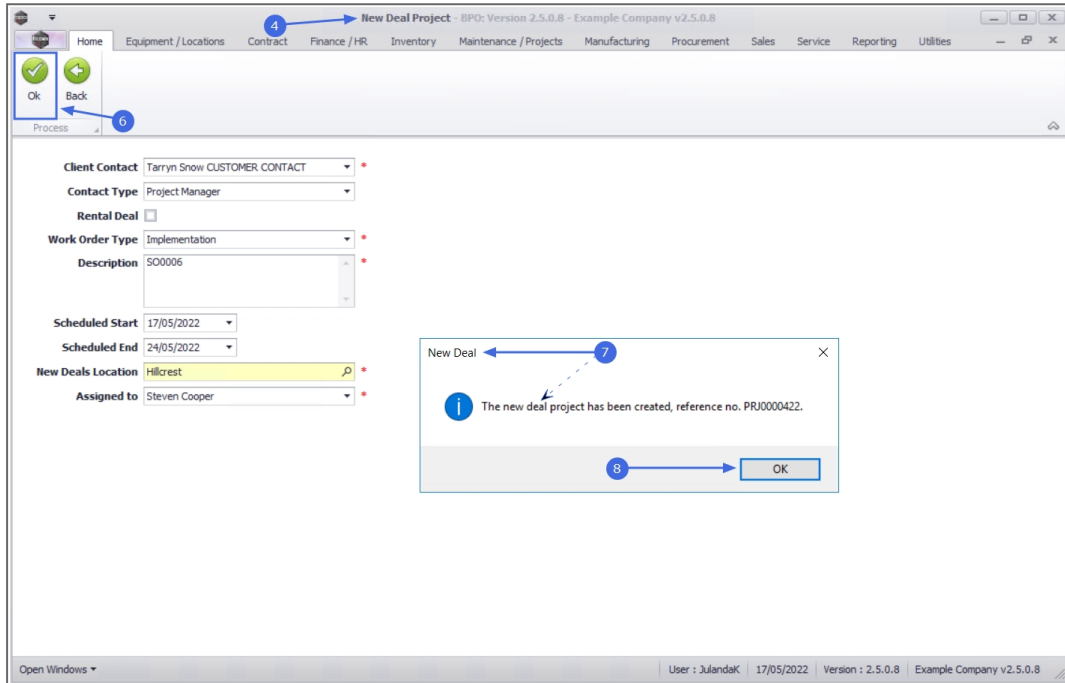


Short cut key: Right click to display the **All groups** menu list. Click on **New Deal Project**.



OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	Comments	Status
OR0000340	BIG0001	Big Bargains	CQ002	1,127.00	ZAR	17/05/2022	Julanda Kessler	1.00	15.00	Additional Traveling requir...	A
OR0000341	BIG0001	Big Bargains	SO004	893.55	ZAR	17/05/2022	Julanda Kessler	1.00	15.00		A
OR0000342	BIG0001	Big Bargains	SO005	28,750.00	ZAR	17/05/2022	Julanda Kessler	1.00	15.00		A
OR0000343	BIG0001	Big Bargains	SO006	287.50	ZAR	17/05/2022	Julanda Kessler	1.00	15.00		A

- "The New Deal Project screen will be displayed. " on page 3
- Complete the New Deal Project Details as required,
- Click on **OK** to save the new deal details.
- When you receive the **New Deal** message to confirm;
 - **The new deal project has been created, reference no. [reference number]**
- Click on **OK**.



- You will return to the **Sales Order** screen.

For a detailed handling of this topic refer to [Orders - Convert to New Deal Project](#)

PRINT SALES ORDER / PRINT PROFORMA INVOICE

You will be able to *Print a Sales Order* and / or *Print a Proforma Invoice* from the;

- Sales Orders screen
- Add New Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

For this example, the proforma invoice will be printed from the *View Customer Order - [Order Number]* screen. The same procedure can be followed from any of the above mentioned screens.

- From the ***View Customer Order - [Order Number]*** screen,
- Click the print option that you require.



Print Sales Order



Print Proforma Invoice

- The example has ***Print Sales Order*** selected.

View Customer Order - OR0000342 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Back Save Layout Print Sales Order Print Proforma Invoice

Customer Name: Big Bargains
Contact Name: Tarryn Snow
Commercial Type Class: Julanda K
Salesman: Julanda K
Billing Customer: Big Bargains
Order Currency: South African Rand
Tax Rate: 15.00

SO005
I
17/05/2022 15:41:59

Billing address: PO Box 1985, New Town
Shipping address: 29 Dune Ave, New Town, Durban

Billing Contact: Tarryn Snow CUSTOMER CONTACT
Exchange Rate: 1

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPri
No	WARR	IYSW	1 Year Supplier ...	1 Year Supplier Warr...		1.000	0.000	0.000	0.000	0.000	0.000	25,000.000	25,000

Comment

Sub Total: 25,000.00
VAT: 3,750.00
Grand Total: 28,750.00

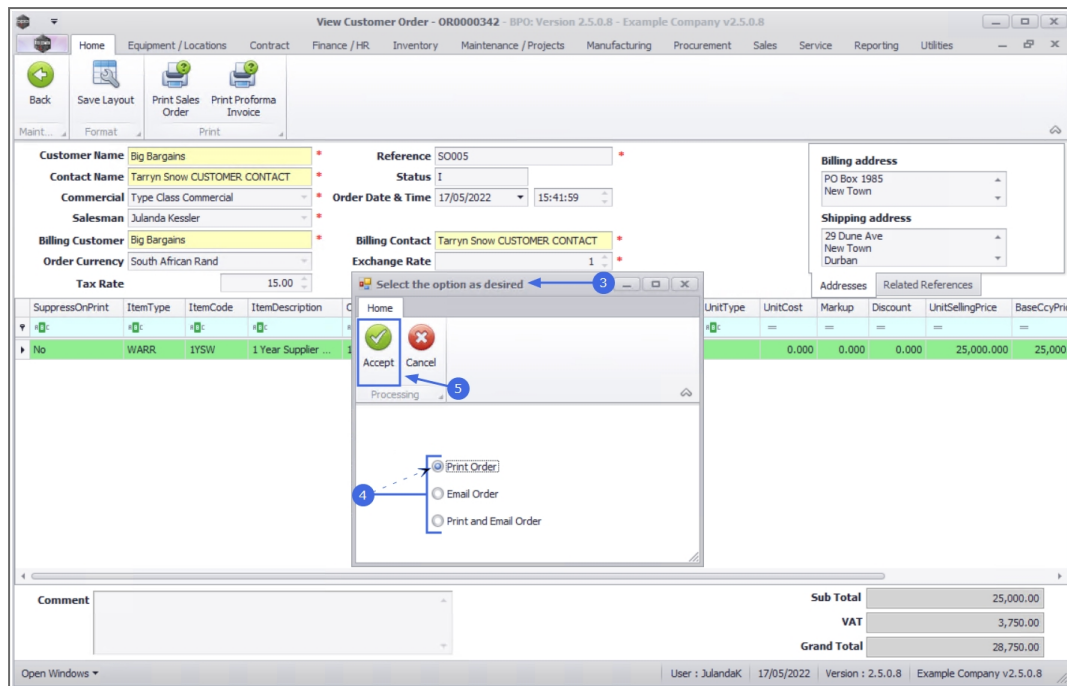
Open Windows User: JulandaK 17/05/2022 Version: 2.5.0.8 Example Company v2.5.0.8

- The **Select the option as desired** message will display.
- Click on the **radio button** to select either **Print Order, Email Order** or **Print and Email Order**.



When selecting to **Email the Quote**, the quote will be emailed via the **BPO Email Service** on the server and **not** from MS Outlook.

- The example has **Print Order** selected.
- Click on **Accept** to proceed.



- The Sales Order or the Proforma Invoice (this will depend on the print option you made earlier) will display in the **Preview** screen.
- You can make cosmetic changes to the document, as well as **Save**, **Print**, **Export**, **Add a Watermark** or **Email** the Sales Order or Proforma Invoice.
- Click on **Close** to return to the **Sales Quotes for Customer** screen.



For a detailed handling of this topic refer to [Orders - Print Sales Order](#) or [Orders - Print Proforma Invoice](#)

