

SERVICE

CALLS - START WORK

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.

You can begin the **Start Work** process from the Call Listing screen in BPO. From here you can **Start** and **End** work on the Calls you are working on.

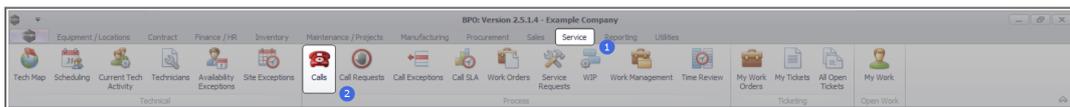
You or the Call Centre, can start work on behalf of a **Technician**, but the Technician will need to end work for themselves.

A Call must be in the New status to enable **Start Work**. It will then move to the **In Progress** status where you can continue the process until End Work.



If a technician is using **Tech Connect**, then he can **Start Work** on the Call from his device.

Ribbon Select *Service* > *Calls*



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

¹BPO2 v2.5.1.3 or higher

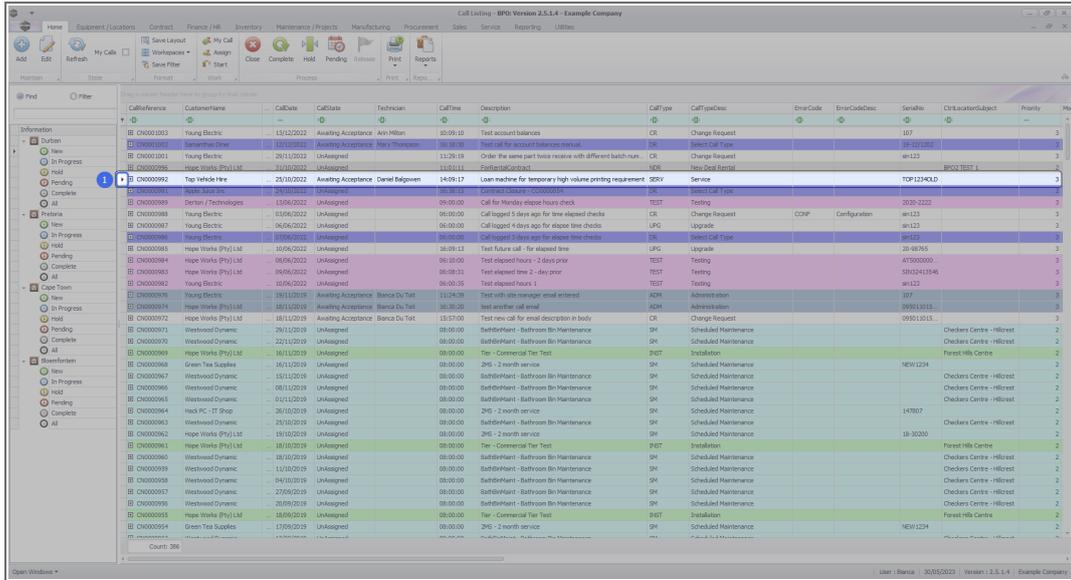
CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
CHN001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balances	CR	Change Request			107	BPO2 TEST 1	3
CHN001002	Salematic Driver	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			107	BPO2 TEST 1	3
CHN001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			107	BPO2 TEST 1	3
CHN000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		11:01:11	Printer/Barcode	IGR	New Deal Rental					3
CHN000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:59:17	Loan machine for temporary high volume printing requirement.	SRV	Service				TOP1234OLD	3
CHN000991	Askle Java Inc	24/10/2022	Unassigned		06:58:15	Contact Closure - C0000054	SR	Select Call Type					3
CHN000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday escape hours check	TEST	Testing			2020-2222		3
CHN000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	107		3
CHN000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for escape time checks	UPG	Upgrade			107		3
CHN000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for escape time checks	SR	Select Call Type			107		3
CHN000985	Hope Works (Pty) Ltd	03/06/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			107		3
CHN000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT200000		3
CHN000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN23141546		3
CHN000982	Young Electric	18/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			107		3
CHN000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our manager email entered	ADM	Administration			107		3
CHN000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ADM	Administration			09501015		3
CHN000972	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
CHN000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
CHN000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
CHN000967	Westwood Dynamic	16/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000964	Red PC - IT Shop	20/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
CHN000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
CHN000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
CHN000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
CHN000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- 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.



This can be an **Unassigned** call or a call where you have assigned the **Technician**.

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



- Click on the **Start** button.



- The **Time Logging Express** screen will be displayed.

START WORK DETAILS

- **Employee:** The employee field will be populated with the person currently logged onto the system. Click on the down **arrow** to select an alternative employee, if required.
- **Call:** The call number and description of the selected call will populate this field. Click on the down **arrow** to select an alternative call number from the call list, if required.
- **Work Order:** If only one Work Order is linked to this call, then this field will populate with the **work order number** and **description**.

- If more than one Work Order has been linked to the call, click on the down **arrow** to select the required Work Order.
- **Equipment:** Once the Work Order has been selected, the equipment field will populate with the **serial number** and **description** of the machine linked to the work order, if applicable.
- **Location:** If a **functional location** has been linked to the work order, then this field will populate with the location.

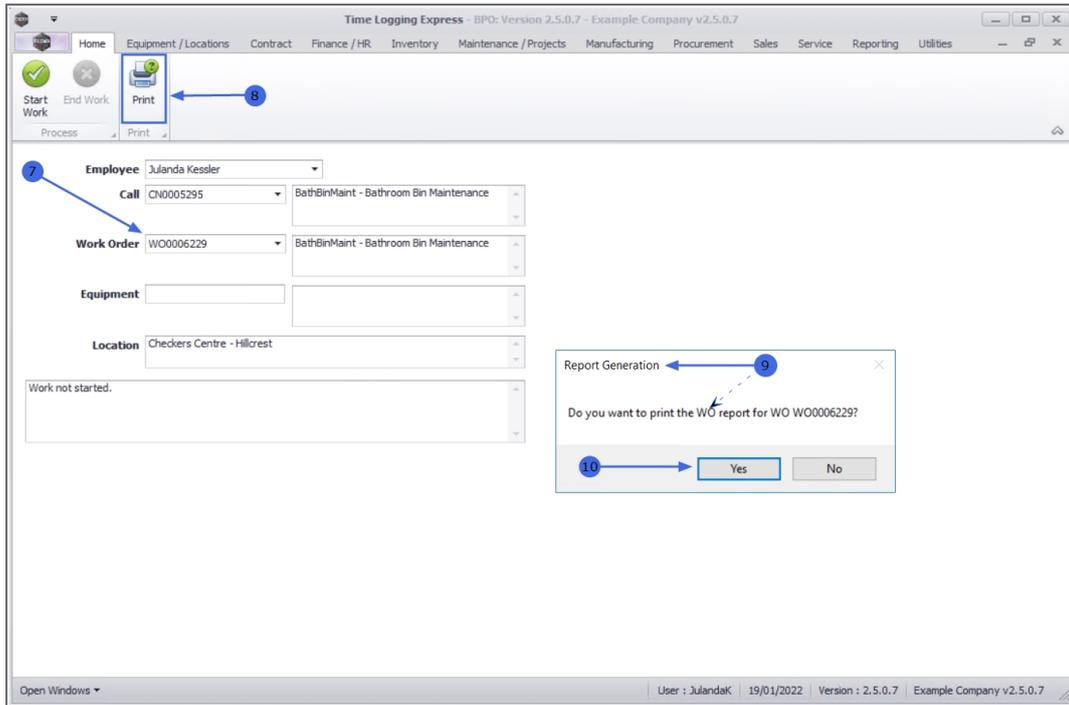


Note that the Work Order will be linked to either a *machine* or a *location*.

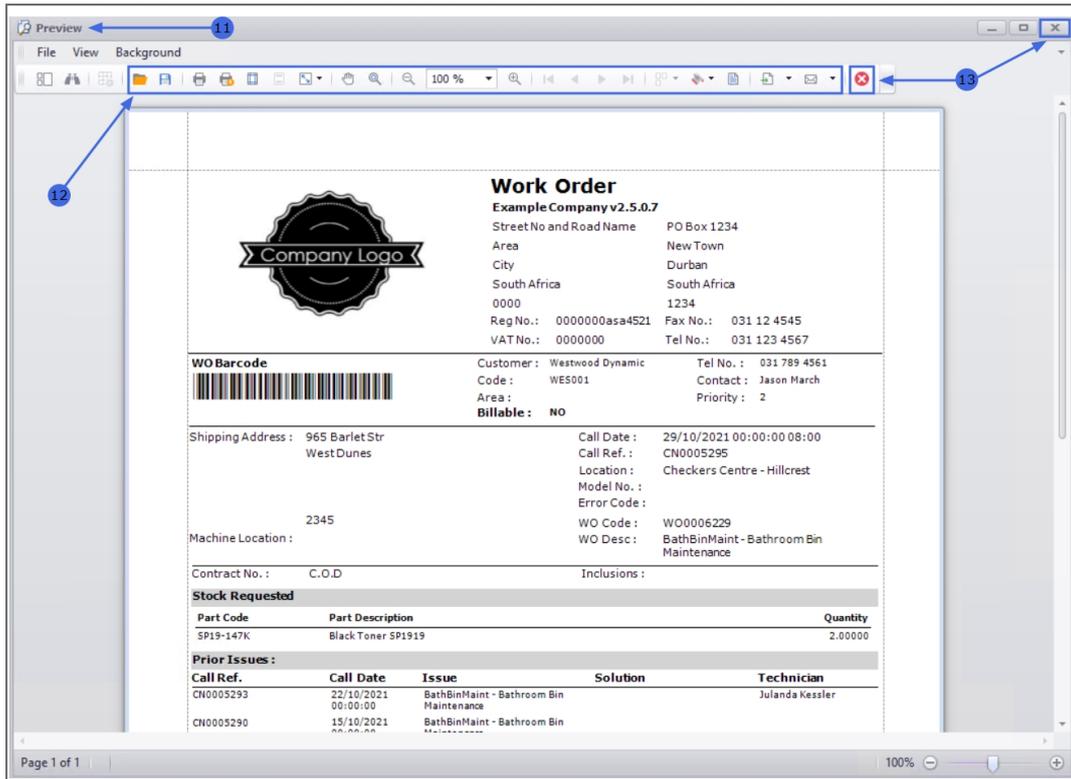
- **Status:** The final unlabelled text box will contain a description of the current status of the work e.g. **"Work not started"**.

PRINT WORK ORDER REPORT

- Once the Work Order has been selected, you can Print the Work Order Report.
- Click on **Print**.
- When you receive the **Report Generation** message to confirm;
 - **Do you want to print the WO report for WO [number]?**
- Click on **Yes**.

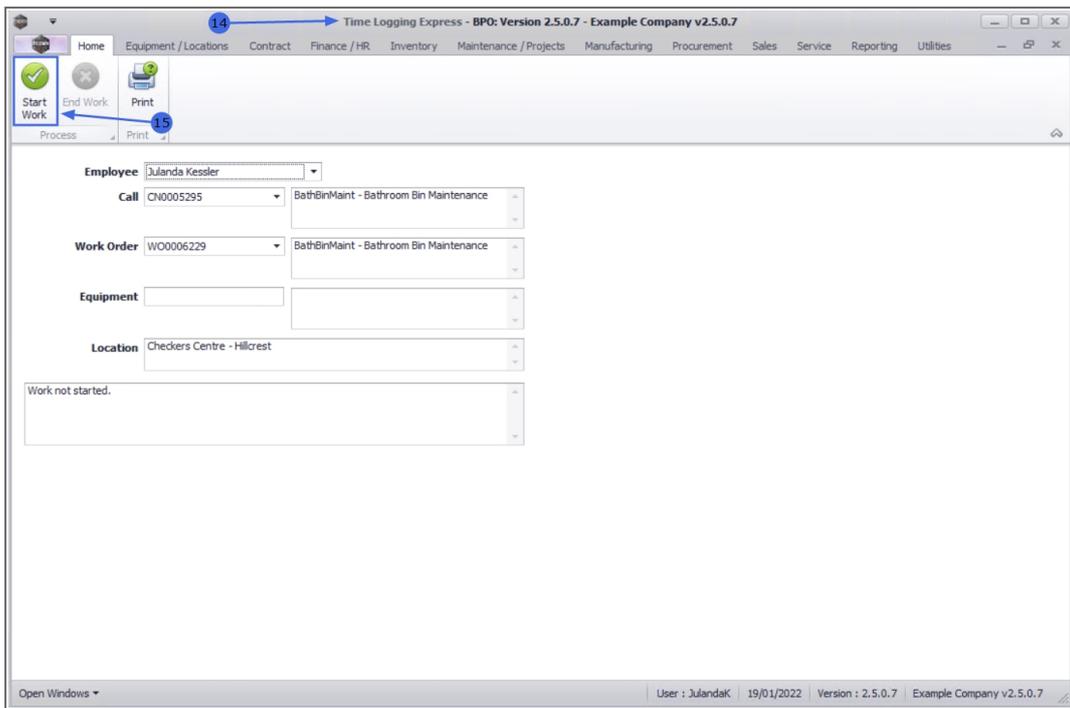


- The Work Order will display in the Reports **Preview** screen.
- From the preview screen you can make cosmetic changes to the document as well as **Save, Zoom, Add a Watermark, Export** or **Email** the report.
- Click on **Close** to return to the **Time Logging Express** screen.

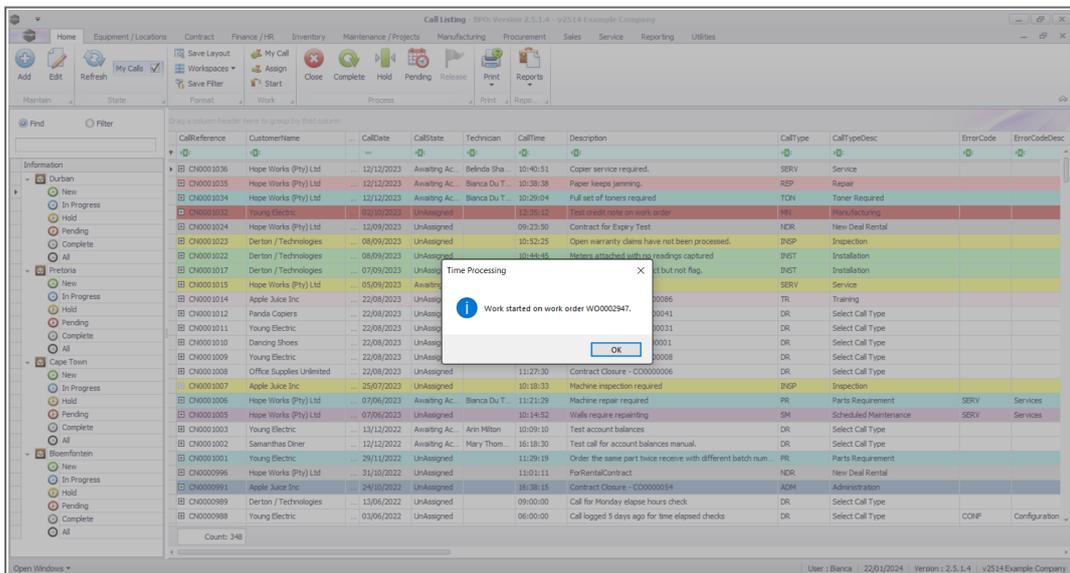


START WORK

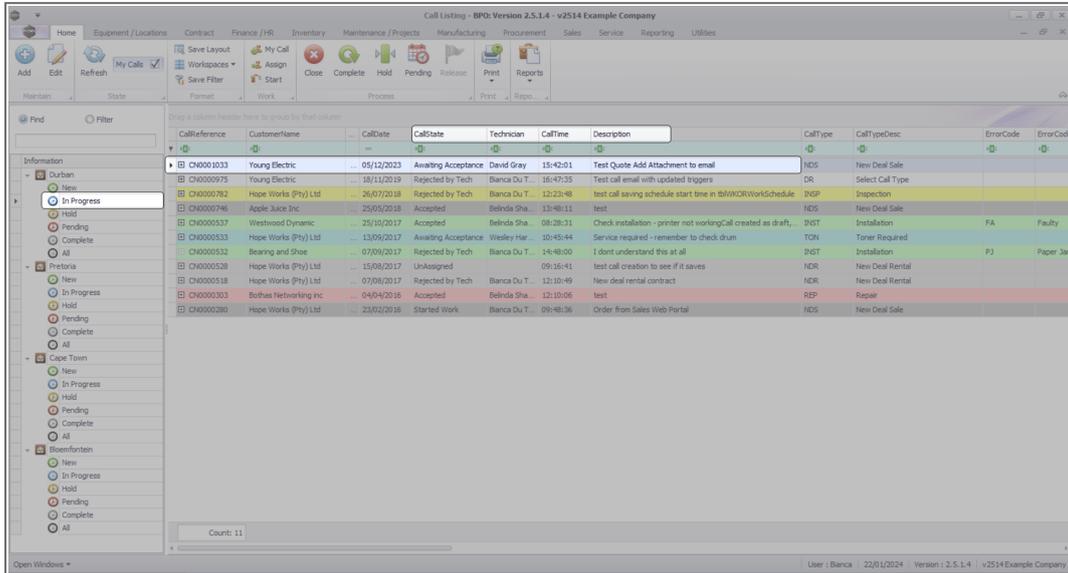
- From the *Time Logging Express* screen,
- Click on *Start Work*.



- You will return to the **Call Listing** screen.
- When you receive the **Time Processing** message to confirm that:
 - **Work started on work order WO[number].**
- Click on **OK**.

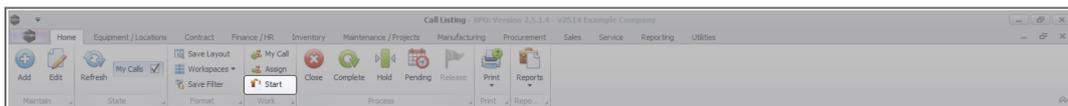


- The Call has been **removed** from the Call Listing screen where the status is New.
- Click on the **In Progress** status to view the call.
- Note the **Call State** for the call has change to **Started Work**.

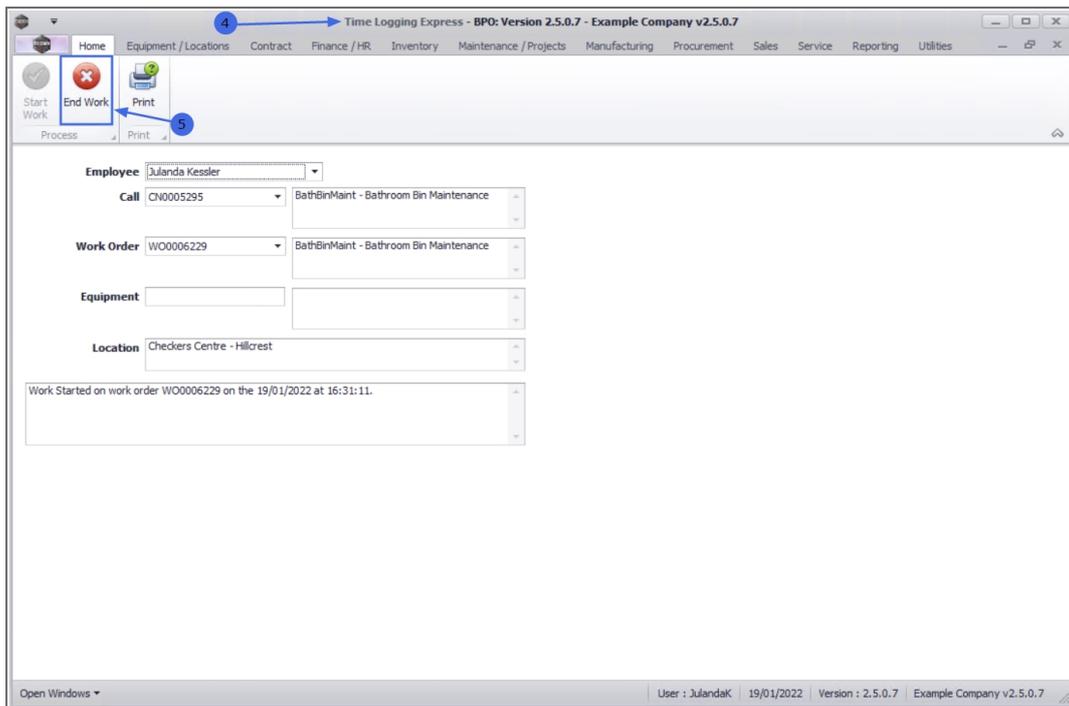


END WORK

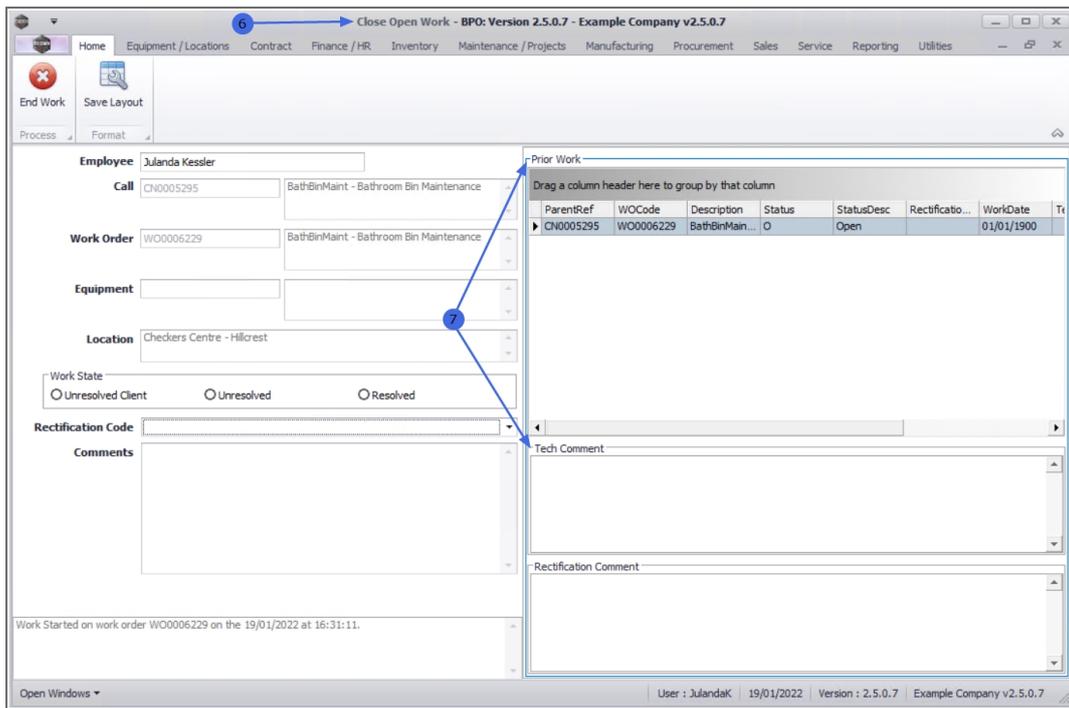
- To end work on a call, ensure that the Status has been set to **In Progress**.
- Click on the **row** of the call you wish to end.
- Click on **Start**.



- The **Time Logging Express** screen will display.
- Click on **End Work**.



- The **Close Open Work** frame will display.
- Any previous work will be noted in the **Prior Work** and **Tech Comment** frames.
 - Click on a row in the Prior Work frame. The **corresponding observation** from the Technician responsible for the work, will reflect in the **Tech Comment** frame, if a comment was recorded.
 - The **corresponding rectification observation** from the Technician responsible for the previous call, will reflect in the Rectification Comment frame, if a comment was recorded.
 - Use the **scroll bar** to scroll across the Prior Work frame to view more information related to previous calls, such as the previous work date(s), the previous Technician responsible for the work order, etc.

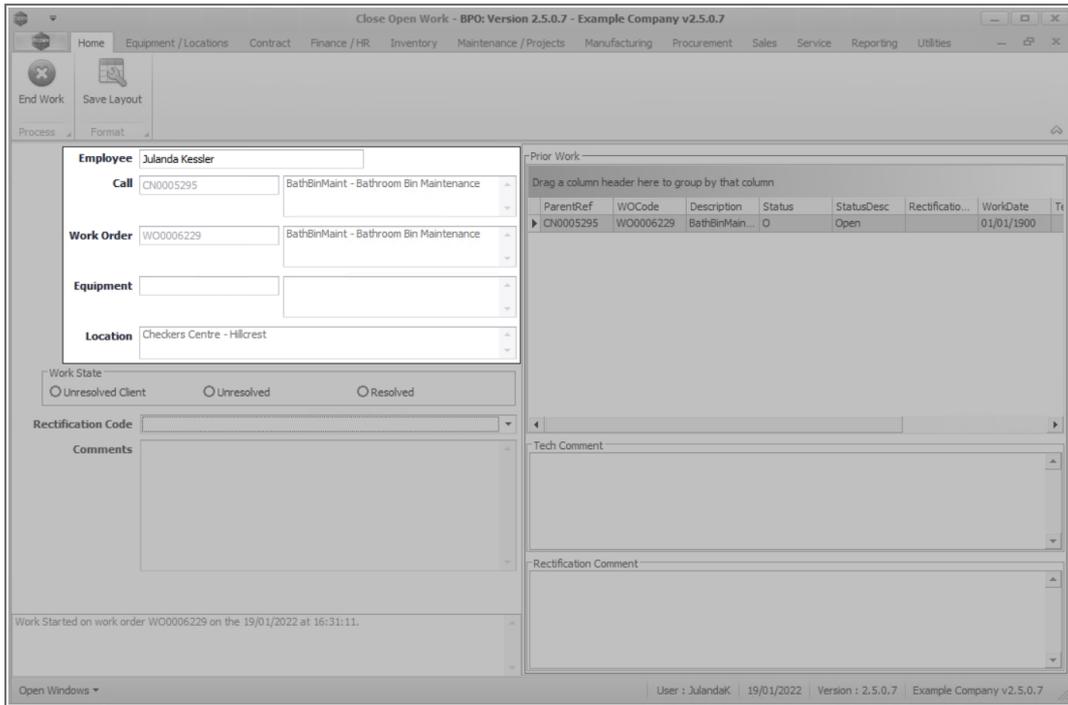


OPEN WORK DETAILS



Note that this information cannot be edited in this screen.

- **Employee:** The employee field will auto populate with the person selected on the Time Logging Express screen.
- **Call:** The call field will display the Call number and description.
- **Work Order:** This field will display the selected Work Order number and description.
- **Equipment:** The equipment field will display the serial number and description, if a machine was linked to the work order.
- **Location:** The **functional location** will populate this field, if a location was linked to the work order.



The screenshot shows the 'Close Open Work' interface for 'Example Company v2.5.0.7'. The main window contains several input fields and a table.

Employee: Julanda Kessler

Call: CN0005295 | BathBinMaint - Bathroom Bin Maintenance

Work Order: WO0006229 | BathBinMaint - Bathroom Bin Maintenance

Equipment: [Empty]

Location: Checkers Centre - Hillcrest

Work State: Unresolved Client Unresolved Resolved

Rectification Code: [Dropdown]

Comments: [Text Area]

Prior Work Table:

ParentRef	WOCODE	Description	Status	StatusDesc	Rectificabo...	WorkDate	Tr
▶ CN0005295	WO0006229	BathBinMain...	O	Open		01/01/1900	

Tech Comment: [Text Area]

Rectification Comment: [Text Area]

Work Started on work order WO0006229 on the 19/01/2022 at 16:31:11.

User: JulandaK | 19/01/2022 | Version: 2.5.0.7 | Example Company v2.5.0.7

WORK STATE

It is important to select the correct *Work State* as each selection will place the call in a different status:

Unresolved Client - This will place the call on *Hold* in the Call Centre
(Refer to [Calls - Place on Hold](#))

Unresolved (Company) - This will place the call in *Pending* in the Call Centre
(Refer to [Calls - Move to Pending Status](#))

Resolved - This will place the call in the *Complete* status in the Call Centre
(Refer to [Calls - Complete a Call](#))

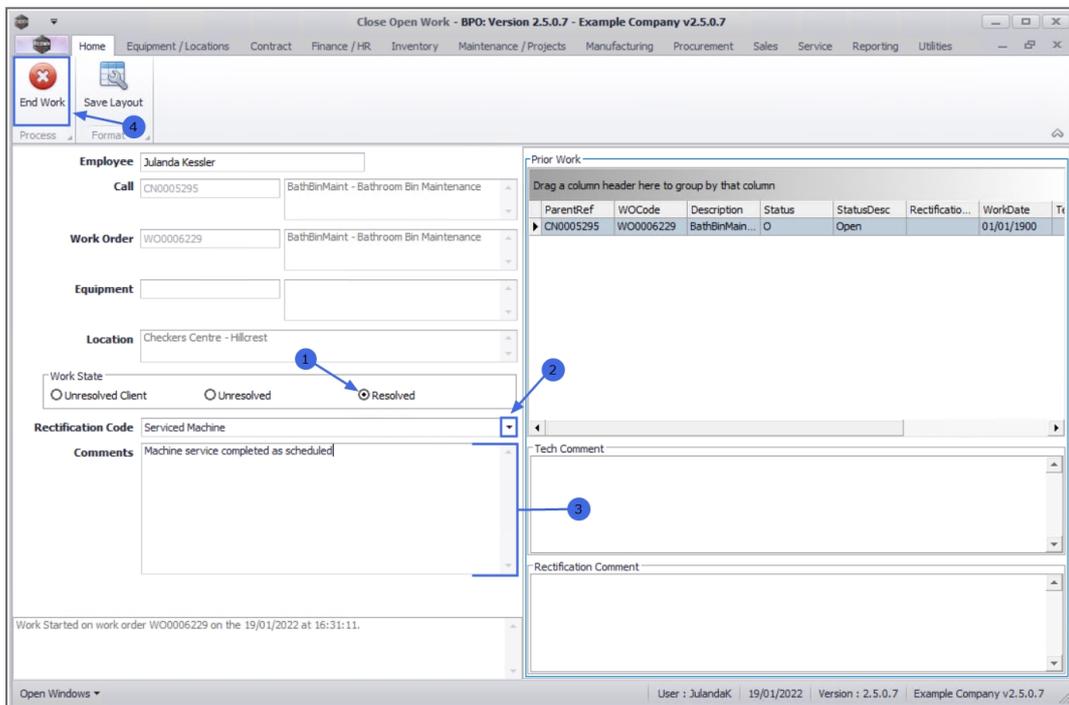
Resolved

- Click on the **Resolved** radio button.
- **Rectification Code:** Click on the down **arrow** to select the appropriate rectification **Reason Code** and **Description** from the options list.



The **Hold reason codes** are set up in Static Data in the Configurator.

- **Comments:** Click in the text box to type in a **comment** related to the call rectification.
- Click on **End Work**.



The screenshot shows the 'Close Open Work' interface for 'BPO: Version 2.5.0.7 - Example Company v2.5.0.7'. The 'End Work' button is highlighted with a blue circle and arrow labeled '4'. The 'Work State' section has the 'Resolved' radio button selected, indicated by a blue circle and arrow labeled '1'. The 'Rectification Code' dropdown menu is open, showing 'Serviced Machine', with a blue circle and arrow labeled '2' pointing to the dropdown arrow. The 'Comments' text area contains the text 'Machine service completed as scheduled', with a blue circle and arrow labeled '3' pointing to the text area. The 'Prior Work' table is visible on the right side of the interface.

ParentRef	WOCCode	Description	Status	StatusDesc	Rectificatio...	WorkDate	Tr
▶ CN0005295	WO0006229	BathBinMan...	O	Open		01/01/1900	

Work Started on work order WO0006229 on the 19/01/2022 at 16:31:11.

User : JulandaK | 19/01/2022 | Version : 2.5.0.7 | Example Company v2.5.0.7

Unresolved / Unresolved Client

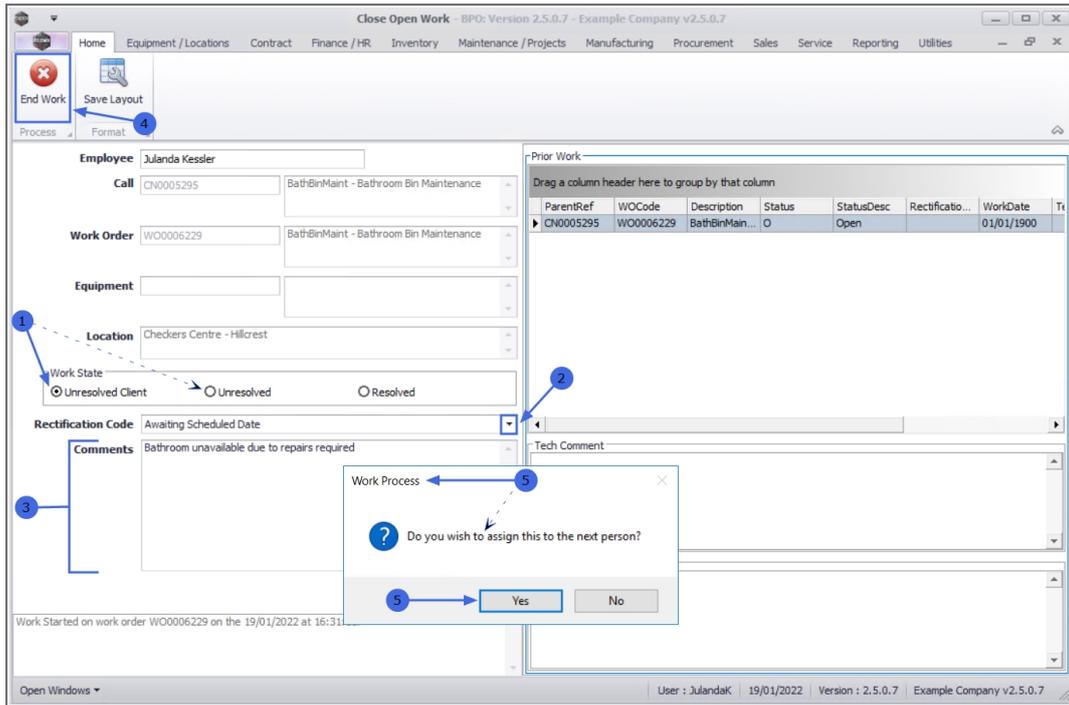
The procedure for an *Unresolved* or *Unresolved Client* Call is very similar. For the purpose of the example, the Unresolved Client option will be followed.

- Click on the ***Unresolved*** or ***Unresolved Client*** radio button.
 - In the example the ***Unresolved Client*** radio button was selected.
- ***Rectification Code:*** Click on the down ***arrow*** to select the appropriate rectification ***Reason Code*** and ***Description*** from the options list.



The **Hold reason codes** are set up in Static Data in the Configurator.

- ***Comments:*** Click in the text box to type in a ***comment*** as to the reason for call being unresolved.
- Click on ***End Work***.
- When you receive the ***Work Process*** message requesting;
 - ***Do you wish to assign this to the next person?***
- Click on ***Yes*** to assign the call to the next person, or
 - select ***No*** to leave the call open as ***Unassigned***.



Assign Call

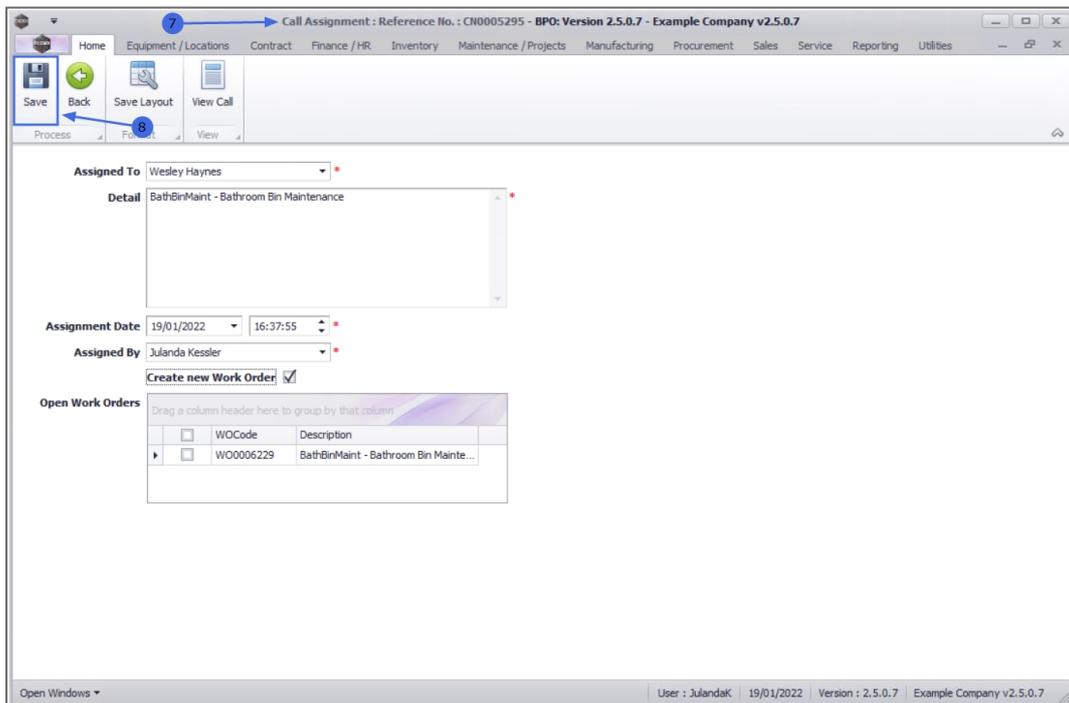
- The **Call Assignment : Reference No: CN[number]** screen will be displayed.
 - **Assigned To:** Click on the down **arrow** to select the person you wish to assign the work order to.



Note that you can assign the work order to yourself, if required.

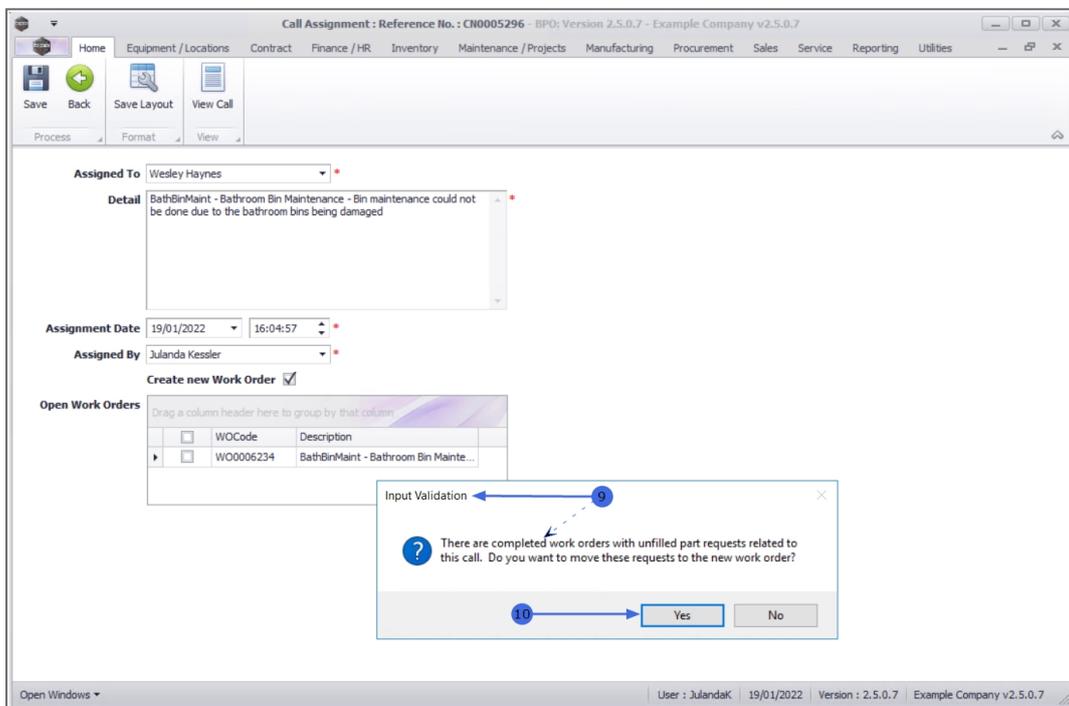
- **Detail:** The information linked to the work order will display in this field. Add or edit the information as required.
- **Assignment Date:** and **Time:** This will auto populate with the current date and time.

- **Date:** Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.
- **Time:** Type in or use the **arrow** indicators to select an alternative time, if required.
- **Assigned By:** The name of the person currently logged on to the system will display in this field. Click on the down **arrow** to select an alternative person, if required.
- **Create new Work Order:** Click on the check box to create a **new work order** to be **linked** to the call.
- **Open Work Orders:** All the open work orders for the call will be displayed in the open work orders frame. Click to select the relevant work order if you wish to assign the work to an existing work order.
- Click on **Save**.

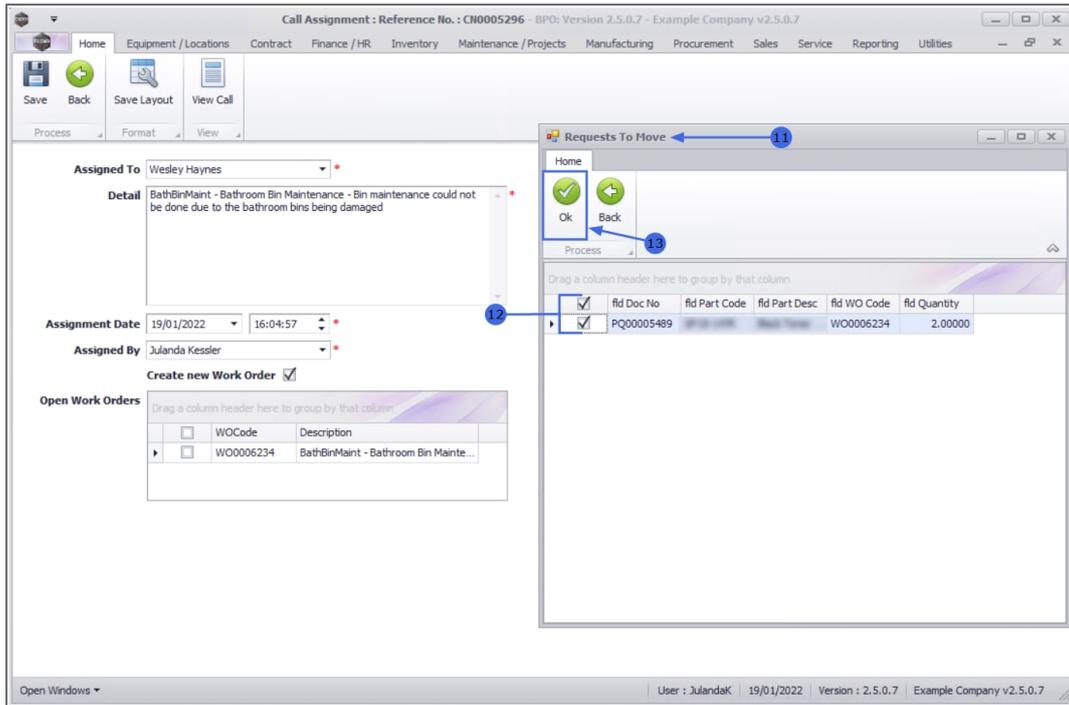


Unfulfilled Part Requests

- When assigning a work order, and unfulfilled part requests related to the call exists, then you will receive an **Input Validation** message to confirm;
 - **There are completed work orders with unfulfilled part requests related to this call. Do you want to move these requests to the new work order?**
- Select **Yes** to move the part requests to the new work order, or
 - select **No** to complete the unfulfilled part requests. Refer to [Work Orders - Part Requests](#)

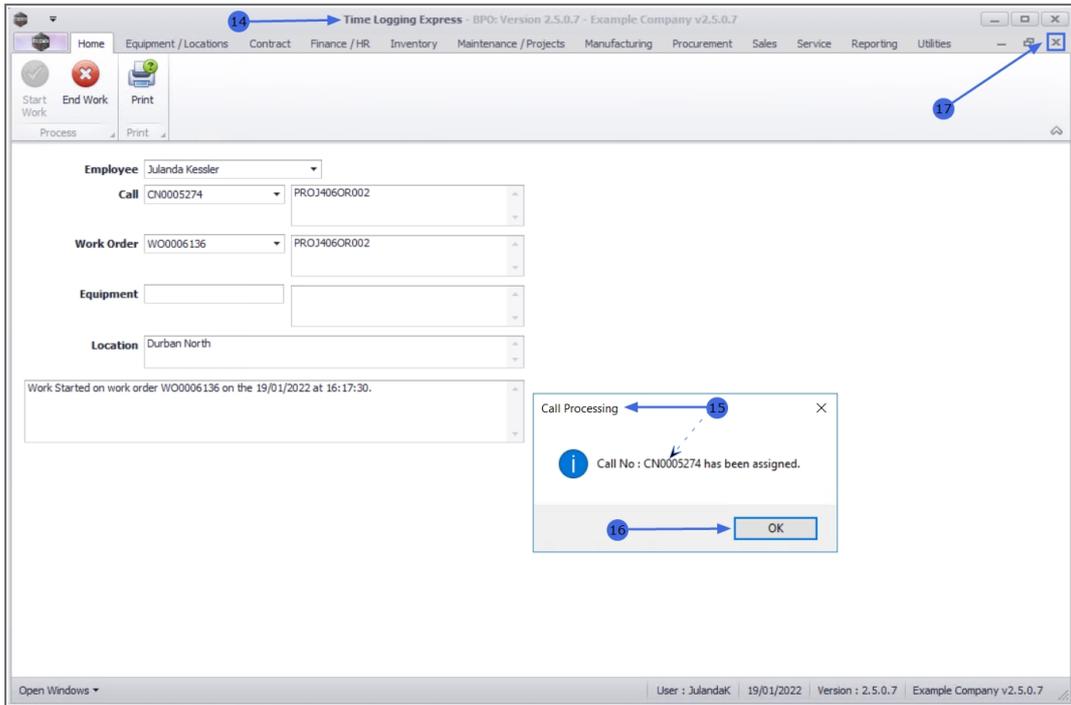


- The **Requests To Move** screen will display with a list of all the unfulfilled Part Requests.
- Click to **select** the part requests you wish to **move** to the new work order.
- Click on **OK**.

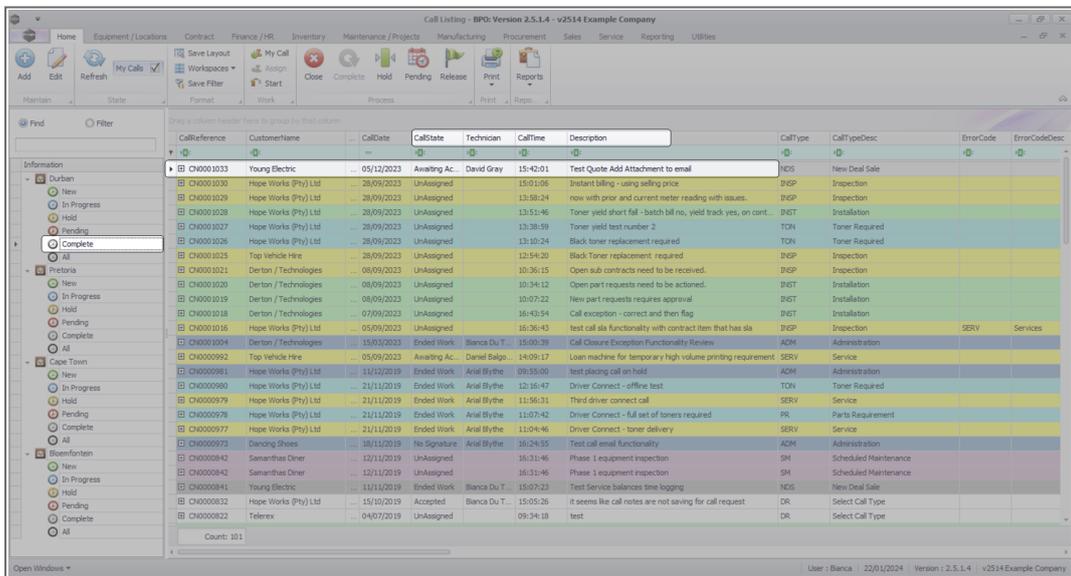


CALL PROCESSING

- You will return to the *Time Logging Express* screen.
- When you receive the *Call Processing* message to confirm that;
 - *Call No: CN[number] has been assigned.*
- Click on **OK**.
- **Close** the screen.



18. You will return to the **Call Listing** screen.
19. The Call will no longer be in the **In Progress** status.
20. For an **Unresolved Client**, the call can be viewed in the **Hold** status, the **Unresolved** call can be viewed in the **Pending** status, and the **Resolved** call can be viewed in **Complete** status.





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