

# 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 Compatibility<sup>1</sup>. 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 <u>Call Centre Mode</u> notes.

You can begin the **Start Work** process from the <u>Call Listing</u> 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 <u>New</u> 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



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Data	E CN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
O New	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
In Process	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
() Hold	E CN0000996	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP 12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Call Type					
O AI	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
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O New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR.	Select Call Type			sin123		
Hold	EE CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O al	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
New New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
<ul> <li>In Progress</li> </ul>	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
🕑 Hold	E CN0000972	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		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	SathSinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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- 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.

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In Progress	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123			
() Hold	E CN0000996	Hope Works (Pty) Ltd		UnAssigned			ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1		2
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This can be an *Unassigned* call or a call where you have assigned the *Technician*.

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



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() Al	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:03:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
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New	<ul> <li>CN0000976</li> </ul>	Young Electric	19/11/2019	Awaiting Acceptance	Blanca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
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	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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• Click on the *Start* button.

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

#### **START WORK DETAILS**

- Employee: The employee field will populated with the person <u>currently</u> 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 <u>only one</u> 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.



Home Equi	pment / Locations Contract	Time Logging Express - BPC t Finance / HR Inventory Mainte	0: Version 2.5.0	1.7 - Example Cor Manufacturing	npany v2.5.0.7 Procurement	Sales	Service	Reporting	Utilities	-	B X
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Open Windows 🕶					User : JulandaK	19/01/202	22 Versi	on : 2.5.0.7	Example Co	mpany v2.	5.0.7

- 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.



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WOB	Barcode		Customer: We	estwood Dynamic	Tel No.: 031 789 4561	_	
			Code: Wi	E5001	Contact : Jason March		
			Area: Billable: NO	<b>b</b>	Priority: 2		
Shipp	ing Address :	965 Barlet Str		Call Date :	29/10/2021 00:00:00 08:00	-	U
		WestDunes		Call Ref. :	CN0005295		
				Location :	Checkers Centre - Hillcrest		
				Model No. :			
		2345		WO Code :	W00006229		
Machi	ine Location :	2010		WO Desc:	BathBinMaint - Bathroom Bin Maintenance		
Contr	ract No. :	C.O.D		Inclusions :		-	
Stoc	k Requested						
Part	Code	Part Description			Quant	ity	
SP19	-147K	Black Toner SP19	19		2.000	000	
Prior	r Issues :						
Call F	Ref.	Call Date	Issue	Solution	Technician		
CN000	05293	22/10/2021 00:00:00	BathBinMaint - Bathroom Bir Maintenance		Julanda Kessler		
CN000	05290	15/10/2021	BathBinMaint - Bathroom Bir	1			Ŧ
4							
Page 1 of 1						100% 🕘 📃	- +

# **START WORK**

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



Ŧ	14	Tim	ie Logging Expre	ess - BPO: V	/ersion 2.5.0.	7 - Example Con	10anv v2.5.0.7						
Home Equ	ipment / Locations Cont	ract Finance / H	R Inventory	Maintenan	nce / Projects	Manufacturing	Procurement	Sales S	ervice R	eporting	Utilities	_	8
tart Kork Priores Prince	int 15												
Employee	Julanda Kessler	-											
Call	CN0005295	BathBinMaint -	Bathroom Bin Main	itenance	*								
Work Order	WO0006229	▪ BathBinMaint -	Bathroom Bin Main	itenance	*								
Equipment					*								
Location	Checkers Centre - Hillcrest				* *								
Work not started.					*								
en Windows 🔻						1	Jser : JulandaK	19/01/2022	Version :	2.5.0.7	Example Co	mpany v2.	5.0.7

- 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].*

Image: Segment (justor)         Outside Twence (Pinger)         Manufactory         Processor         Sele         Source					Call Listing								- 20
Note         Note <th< th=""><th>Home Equipment / Location</th><th>s Contract Fin</th><th>ance / HR Inventory</th><th>Maintenance / Proj</th><th>ects Manufact</th><th>turing Pro</th><th>curement</th><th>Sales Service R</th><th>eporting Utilities</th><th></th><th></th><th></th><th>_ 8 3</th></th<>	Home Equipment / Location	s Contract Fin	ance / HR Inventory	Maintenance / Proj	ects Manufact	turing Pro	curement	Sales Service R	eporting Utilities				_ 8 3
Image: Second Product State Sta	Add Edt Refresh My Calls V	Save Layout       Workspaces *       Save Filter	My Call Start	Complete Hold I	Pending Release	Print	Reports						
Interview         Calibration         Calibration <thcalibration< th=""> <thcalibration< th="">         &lt;</thcalibration<></thcalibration<>													
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Interaction         Image		Caliference	Customentame	CalDate	Calistate	-B-	-B-	-B-		carrype	can ypedesc	errorcode	EntroiCodebes
In Units         18         0000005         Hore Works Phy 114         -10/2/2023         Awang Ac.         Bend Statu         10         Bend Statu	Information	* 1 <u>0</u> :	10:	-	NU:	-U:	10c	10:		ν <u>Π</u> ι	10:	10:	10c
Image: Non-Section of Works Phy1 (1)         - 1/2/2023         Awing A         Banch D.T.         20.33.0         Part Responsibility         Bits Part Respons	- Dichan		Hope Works (Pty) Ltd		Awaiting Ac 8	Belinda Sha	10:40:51	Copier service required		SERV	Service		
Imagene         Imagene <t< td=""><td>New</td><td></td><td>Hope Works (Pty) Ltd</td><td></td><td>Awaiting Ac 8</td><td>Bianca Du T</td><td>10:38:38</td><td>Paper keeps jamming.</td><td></td><td>REP</td><td>Repair</td><td></td><td></td></t<>	New		Hope Works (Pty) Ltd		Awaiting Ac 8	Bianca Du T	10:38:38	Paper keeps jamming.		REP	Repair		
Instructure	In Progress		Hope Works (Pty) Ltd		Awaiting Ac 8	Bianca Du T	10:29:04	Full set of toners requi	red	TON	Toner Required		
mong             0.000000	() Hold	CN0001032	Young Electric	02/10/2023	UnAssigned		12:35:12	Test credit note on wo	rk order	MN	Manufacturing		
O complete         El 0000032         Derive (Terr/Terr/Mage         0.000/022         Managed         100.523         Managed	Pending		Hope Works (Pty) Ltd	12/09/2023	UnAssigned		09:23:50	Contract for Expiry Ter	st	NDR	New Deal Rental		
A         III 0000002         Derive (Technologe         - 000/00000         Network         100-140         Home (Technologe         - 000/00000           • • • • • • • • • • • • • • • • • • •	<ul> <li>Complete</li> </ul>		Derton / Technologies	08/09/2023	UnAssigned		10:52:25	Open warranty claims I	nave not been processed.	INSP	Inspection		
Image: Network in the set of the second of the se	O All		Derton / Technologies	08/09/2023	UnAssigned		10:44:45	Meters attached with n	o readings captured	INST	Installation		
New         EI         00000014         000000054         000000004         0000000054         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000004         000000000         000000000         000000000         000000000         000000000         000000000         000000000         0000000000000000         000000000000000000000000000000000000	👻 🔯 Pretoria		Derton / Technologies	07/09/2023	UnAssig Time	Processing		×	ct but not flag.	INST	Installation		
0             Programs               0             00000000	New		Hope Works (Pty) Ltd	05/09/2023	Awaiting					SERV	Service		
Image: Product opension of the sector of the sect	<ul> <li>In Progress</li> </ul>	⊞ CN0001014	Apple Juice Inc	22/08/2023	UnAssig				00086	TR	Training		
0 - Indivig             0 - Complete             0 - Complet	() Hold	E CN0001012	Panda Copiers	22/08/2023	UnAssig	Work sta	arted on wor	k order WO0002947.	00041	DR	Select Call Type		
O Copylicity         DB CONDIDIO         During these         220/0222         Making of the sector regard         DR1         Select Call Type         M           0         0         00000005         from general methods         220/0222         Making of the sector regard         DR1         Select Call Type         DR	() Pending	E CN0001011	Young Electric	22/08/2023	UnAssig				00031	DR	Select Call Type		
Org.         DB 000000         Trong Beckr.         - 220/0320         Makeg         Low         DB         Set C d1 Type         DP           In Program         D0000000         Frages         - 220/0320         Makeg         - 100/000         Set C d1 Type         - 100/000         - 100/000         Set C d1 Type         - 100/0000         - 100/0000         - 100/0000         - 100/0000         - 100/0000         - 100/0000 <td< td=""><td>Complete</td><td>E CN0001010</td><td>Dancing Shoes</td><td> 22/08/2023</td><td>UnAssig</td><td></td><td></td><td></td><td>0001</td><td>DR</td><td>Select Call Type</td><td></td><td></td></td<>	Complete	E CN0001010	Dancing Shoes	22/08/2023	UnAssig				0001	DR	Select Call Type		
• Bit Wet minin         III 00000000         Offs Register labeling         - 228/0220         Unknowed         112730         One Construct Construct Constructions         PR         Set Call Type         Image: Construction Constructions         PR         Pack Segment         SEN/         SEN/         Sen/call         Sen/call<		E CN0001009	Young Electric	22/08/2023	UnAssig			OK	00008	DR	Select Call Type		
In Program         Images         Ima	Cape Town	E CN0001008	Office Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - COO	000006	DR	Select Call Type		
Other         Opening Exct:         Opening Exct: <td></td> <td>CN0001007</td> <td>Apple Juice Inc</td> <td> 25/07/2023</td> <td>UnAssigned</td> <td></td> <td>10:18:33</td> <td>Machine inspection reg</td> <td>uired</td> <td>INSP</td> <td>Inspection</td> <td></td> <td></td>		CN0001007	Apple Juice Inc	25/07/2023	UnAssigned		10:18:33	Machine inspection reg	uired	INSP	Inspection		
O         Profig         El         Oxec:100         Status         Difference         Status         Status <td>() Hold</td> <td>E CN0001006</td> <td>Hope Works (Pty) Ltd</td> <td> 07/06/2023</td> <td>Awaiting Ac 8</td> <td>Bianca Du T</td> <td>11:21:29</td> <td>Machine repair requires</td> <td>ł</td> <td>PR</td> <td>Parts Requirement</td> <td>SERV</td> <td>Services</td>	() Hold	E CN0001006	Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac 8	Bianca Du T	11:21:29	Machine repair requires	ł	PR	Parts Requirement	SERV	Services
O Consister         EIG 00000000         Trong Bloch:         - 13/12/2022         Avaing Ac.         Aren Matrix         100%100         Test accurate balances         CR         Select Call Type         Assister Call Type           • In Front rest         ID 00000000         Samothas Drive         - 13/12/2022         Avaing Ac.         Aren Matrix         100%100         Test accurate balances         CR         Select Call Type         In Forget           • In Front rest         ID 00000000         Trang Select:         - 31/12/2022         Avainged         110/111         Fore Select Call Type         Post Select Call Type           • In Front rest         ID 00000001         Trang Select:         - 31/10/2022         UAkanged         110/111         Fore Select Call Type         Post Select Call Type           • In Front rest         ID 0000001         Trang Select:         - 31/10/2022         UAkanged         110/111         Fore Select Coll Type         Advalance           • In Front rest         ID 0000001         Rest Neich Rest         - 31/10/2022         UAkanged         130/1102         UAkanged         130/1102         UAkanged         130/1102         UAkanged         130/111         Fore Select Call Type         Coll Fore Select Call Typ	() Pending	E CN0001005	Hope Works (Ptv) Ltd		UnAssigned		10:14:52	Walls require repainting		SM	Scheduled Maintenance	SERV	Services
O #         El 0000000         Semitha Construction         El 0000000         Semitha Construction         El 0000000         Femilia	<ul> <li>Complete</li> </ul>	E CN0001003	Young Electric	13/12/2022	Awaiting Ac	Arin Milton	10:09:10	Test account balances		DR	Select Call Type		
• Climenformer         © 00000000         Young Beckc         29/1/2022         Unkarged         11/20119         Order the same part histor receive with different bath num.         PR         Parts Requerement           · O In Progress         © 00000000         moury Work PP(1) L         -31/1/2022         Unkarged         11/20119         Order the same part histor receive with different bath num.         PR         Parts Requerement           · O In Progress         © 00000000         moury Work PP(1) L         -31/1/2022         Unkarged         11/20119         Contrast Concerct         NOR         None Deal Restall           · O Hot         © 00000000         Detron / Technologies         -31/1/2022         Unkarged         93/0116         Contrast Concerce with different bath num.         PR         Parts Requerement         Parts         Parts <t< td=""><td>O All</td><td>E CN0001002</td><td>Samanthas Diner</td><td> 12/12/2022</td><td>Awaiting Ac</td><td>Mary Thom</td><td>16:18:30</td><td>Test call for account ba</td><td>lances manual.</td><td>DR</td><td>Select Call Type</td><td></td><td></td></t<>	O All	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Ac	Mary Thom	16:18:30	Test call for account ba	lances manual.	DR	Select Call Type		
One         Ele Conscions         Here Insite Physical         - 31/2/2022         Unkerged         131/2/11         Constraint/Constant         FOR         Mem Coal Remail           On Provides         ID Conscions         Here Coal Remail         - 31/2/2022         Linkageed         31/2/11         Constraint/Constant         ACM         Adversariation           On Provides         ID Conscions         Here Coal Remail         - 31/2/2022         Linkageed         31/2/11         Constant/Constant         ACM         Adversariation	+ 🖸 Bloemfontein	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part ty	vice receive with different batch num	PR	Parts Requirement		
O         In Progress         O         Non-         Non-         Non-           © Indid         © Indid         © Indiduction         Scientist Closure - C0000054         Advances         Advances         Complexe           © Indid         © Indiduction         © Indiduction         Scientist Closure - C0000054         Advances         Advances         Complexe           © Indiduction         © Indiduction         Scientist Closure - C0000054         Advances         Complexe         Complexe<	New	E CN0000995	Hope Works (Ptv) Ltd		UnAssigned			ForRentalContract		NDR	New Deal Rental		
Op Instit         ID 0000009         Detror / Technologies	<ul> <li>In Progress</li> </ul>	E CN0000991	Apple Brice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO	1000054	ADM	Administration		
Orange Box Constant Control Contectific Control Control Control Control Control Control Control C	() Hold	E CN0000989	Derton / Technologies	13/05/2022	UnAssigned		09-00-00	Call for Moorlay elaose	hours chark	DP	Select Call Type		
Control Contro Control Control Control Control Control Control Control Control C	Pending	E CN0000988	Young Electric	03/05/2022	UnAssigned		06:00:00	Call looped 5 days app	for time elansed checks	DR	Select Call Type	CONE	Configuration
Count: 348	Complete		i de grecore		a many no			car wygeu o wy's ago	ter ene oppres sinces	-	Section ( ))/c	0010	Son ingur o'DOIT
	0 4	Count: 348											

• 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*.

ф т				Call Listing - BP	D: Version 2.5	i.1.4 - v2514	Example Company			_	e x
Home Equipment / Location	ns Contract Fin	nance / HR Inventory	Maintenance / Proje	cts Manufacturing	Procurem	ent Sales	Service Reporting Utilities				₽×
	Save Layout	AL My Call		the line .		a					
My Calls V	Workspaces *	Assign		10 P   1							
Add Edit Refresh	Save Filter	Close Co	implete Hold Pi	ending Release	Print Repo	rts					
											~~
Find     Filter											
	CalReference	CustomerName	CalDate	CallState	Technician	CallTime	Description	CalType	CallTypeDesc	ErrorCode	ErrorCode
	Y 100	AD:		a∏c	# <b>I</b> C	A C	10:	* <b>0</b> ¢	A 🖸 C	1 <b>0</b> 4	<u>ال</u> :
Information	▶ ⊞ CN0001033	Young Electric	05/12/2023	Awaiting Acceptance	David Gray	15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale		
- O Durban	E CN0000975	Young Electric	18/11/2019	Rejected by Tech	Bianca Du T	16:47:35	Test call email with updated triggers	DR	Select Call Type		
O New	E CN0000782	Hope Works (Pty) Ltd	26/07/2018	Rejected by Tech	Bianca Du T	12:23:48	test call saving schedule start time in tblWKORWorkSchedule	INSP	Inspection		
In Progress	CN0000746	Apple Juice Inc	25/05/2018	Accepted	Belinda Sha	13:48:11	test	NDS	New Deal Sale		
C Reading	E CN0000537	Westwood Dynamic	25/10/2017	Accepted	Belinda Sha	08:28:31	Check installation - printer not workingCall created as draft,	INST	Installation	FA	Faulty
( Complete		Hope Works (Pty) Ltd	13/09/2017	Awaiting Acceptance	Wesley Har	10:45:44	Service required - remember to check drum	TON	Toner Required		
O Al		Bearing and Shoe	07/09/2017	Rejected by Tech	Bianca Du T	14:48:00	I dont understand this at all	INST	Installation	PJ	Paper Jam
+ 🖸 Pretoria	CN0000528	Hope Works (Pty) Ltd	15/08/2017	UnAssigned		09:16:41	test call creation to see if it saves	NDR	New Deal Rental		
O New		Hope Works (Pty) Ltd	07/08/2017	Rejected by Tech	Bianca Du T	12:10:49	New deal rental contract	NDR	New Deal Rental		
<ul> <li>In Progress</li> </ul>	E CN0000303	Bothas Networking inc	04/04/2016	Accepted	Belinda Sha	12:10:06	test	REP	Repair		
() Hold	E CN0000280	Hope Works (Pty) Ltd	23/02/2016	Started Work	Bianca Du T	09:48:36	Order from Sales Web Portal	NDS	New Deal Sale		
Pending											
<ul> <li>Complete</li> </ul>											
_ O AI											
- Cape Town											
O New											
<ul> <li>In Progress</li> </ul>											
() Hold											
() Pending											
Complete											
C Al											
Bioemonitem											
O used											
C Peodes											
Correlate											
O All											
	Count: 11										
											÷.
Open Windows 👻								User : Bian	ca 22/01/2024 Version : 2.5.1.4	4 v2514 Examp	le Company

# **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.



<b>•</b> •	4	Time Logging Express - BPO	Version 2.5.0.	7 - Example Com	pany v2.5.0.7					
Home Equi	ipment / Locations Contra	act Finance / HR Inventory Mainten	ance / Projects	Manufacturing	Procurement	Sales S	ervice Reporting	Utilities	-	8 x
Employee	Julanda Kessler	•								
Call	CN0005295	BathBinMaint - Bathroom Bin Maintenance	*							
Work Order	WO0006229	BathBinMaint - Bathroom Bin Maintenance	*							
Equipment			*							
Location	Checkers Centre - Hillcrest		*							
Work Started on work or	der WO0006229 on the 19/0	1/2022 at 16:31:11.	*							
pen Windows 🕶				u	lser : JulandaK	19/01/2022	Version : 2.5.0.7	Example Co	mpany v2.	5.0.7

- 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, <u>if</u> 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 <u>previous work</u> date(s), the <u>previous</u> <u>Technician</u> responsible for the work order, etc.



### Calls - Start Work

<b>A</b> .		
· ·	Generative Close Open Work - BPO: Versk	In 2.5.0.7 - Example Company V2.5.0.7
Home Eq	upment / Locations Contract Pinance / HK Inventory Maintenance	projects manufacturing procurement sales service Reporting Utilities — 🖛 🥆
End Work Save Layou	it.	
Process "Format	4	۵
Employee	Julanda Kessler	Prior Work
Call	CN0005295 BathBinMaint - Bathroom Bin Maintenance	Drag a column header here to group by that column
		ParentRef WOCode Description Status StatusDesc Rectificatio WorkDate Te
Work Order	WO0006229 BathBinMaint - Bathroom Bin Maintenance	CN0005295 WO0006229 BathBinMain O Open 01/01/1900
	-	
Equipment	^	
	7 *	
Location	Checkers Centre - Hillcrest	
Work State	· · ·	
O Unresolved Clier	nt O Unresolved O Resolved	
Pactification Code	7	
Commonte		Tech Comment
comments		A
		Rectification Comment
Work Started on work orde	er WO0006229 on the 19/01/2022 at 16:31:11.	
	v	
Open Windows 🕶		User : JulandaK 19/01/2022 Version : 2.5.0.7 Example Company v2.5.0.7

#### **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.



<b>• •</b>			Close	Open Work - BPO:	Versio	on <b>2.5.0.7</b> - Exam	ple Company	v2.5.0.7					x
	Home Eq	uipment / Locations Contra	act Finance / HR	Inventory Mainte	nance	/ Projects Manu	ufacturing Pr	ocurement	Sales Servi	ce Reporting	Utilities		9 X
8	5												
End Work	Save Layou	t											
Process _	Employee	A Jacoba Kasalar				- Prior Work							~
	Call		BathBinMaint - Bathro	om Bin Maintenance		Drag a column h	eader here to o	roup by that co	lumn				
	con	CN0003235			-	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio	WorkDat	e Te
	Work Order	W00005229	BathBinMaint - Bathro	om Bin Maintenance	4	CN0005295	WO0006229	BathBinMain	. 0	Open		01/01/19	00
	HOLK OTDET	110000223			-								
	Fauipment				*								
					-								
	Location	Checkers Centre - Hillcrest											
					Ŧ								
Work	k State		OPer	colved									
	in esoived ciler	it Onresolved	U Kes	solveu									
Rectifie	cation Code				-	4							•
	Comments					Tech Comment							-
													-
						Rectification Co	mment						
													<u>^</u>
Work Starte	ed on work orde	er WO0006229 on the 19/01/2	022 at 16:31:11.										
													-
Open Wind	lows 🕶						User	: JulandaK   1	9/01/2022 V	ersion : 2.5.0.7	Example Com	ipany v2.5	0.7 //.

#### WORK STATE

It is important to select the correct *Work State* as each selection will place the call in a <u>different</u> 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** 

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#### 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.

		Close Open Work - BPO:	Versio	on 2.5.0.7 - Exam	ple Company	v2.5.0.7				_	x
Home Eq	uipment / Locations Contra	act Finance / HR Inventory Mainte	nance	/ Projects Man	ufacturing Pi	rocurement	Sales Ser	vice Reporting	Utilities	_ 8	x
8											
End Work Save Layou	t										
Process A Format											$\Diamond$
Employee	Julanda Kessler			Prior Work							
Call	CN0005295	BathBinMaint - Bathroom Bin Maintenance	*	Drag a column h	eader here to g	roup by that co	lumn				
			Ŧ	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio	WorkDate	Te
Work Order	WO0006229	BathBinMaint - Bathroom Bin Maintenance	*	CN0005295	WO0006229	BathbinMain	. 0	Open		01/01/1900	
			Ŧ								
Equipment			*								
			Ψ.								
Location	Checkers Centre - Hillcrest		+								
Work State			_	2							
O Unresolved Clier	nt O Unresolved	Consolved									
Rectification Code	Serviced Machine		-	•							•
Comments	Machine service completed a	is scheduled	*	Tech Comment							
											-
				3							
											-
			-	Rectification Co	mment						-
											-
Work Started on work ord	Employee Julanda Kessler Call CV0005295 BathBinMaint - Bathroom Bin Maintenan Work Order W00006229 BathBinMaint - Bathroom Bin Maintenan Equipment Location Checkers Centre - Hildrest Uwrk State Ourresolved Clent Ourresolved Resolved Eectification Code Serviced Machine Comments Machine Service completed as scheduled			-							
		NUMBERS AND ADDRESS									
			÷								-
Open Windows 👻					User	: JulandaK 1	9/01/2022	Version : 2.5.0.7	Example Con	npany v2.5.0.	7 /

• Click on End Work.



# 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*.



### Calls - Start Work

h =		Class Open Work PDO	Maurie	an 2E07 Firam	ala Company	12507					
Home Fo	ninment /Locations Contr	act Einance / HD Inventory Maint	enance	/ Projecte Man	facturing Dr	version	Calac San	ica Daporting	Litilities	_ 5	1 3
End Work Save Layou	it 4										
Employee	Julanda Kessler			Prior Work							
Call	CN0005295	BathBinMaint - Bathroom Bin Maintenance	÷.	Drag a column h	eader here to g	roup by that co	lumn				
			-	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio	WorkDate	
Work Order	WO0006229	BathBinMaint - Bathroom Bin Maintenance	*	CN0005295	WO0006229	BathBinMain	. 0	Open		01/01/190	C
Equipment			*								
Location	Checkers Centre - Hillcrest		*								
<ul> <li>Unresolved Clier</li> </ul>	nt O Unresolved	O Resolved									
Rectification Code	Awaiting Scheduled Date		•	1							
Comments	Bathroom unavailable due to	repairs required	*	Tech Comment							_
		Work Process		5	×						ĺ
		? Do you wish to	assign	this to the next p	erson?						
ork Started on work ord	ar WO0006770 on the 19/01/	<b>5</b> →[	Y	es	No						
wis walk too on work oro	a waaaaaaaa ah ule 19/01/.	aves in avoilibee.	~								

# 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.

	Call Assignment - Reference No CN0005295 - RPO-Version 2.5.0.7 - Example Company v2.5.0.7			
Home Equ	upment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service	Reporting	Utilities	- 8
Back Save L	Layout View Call			
Assigned To	Wesley Haynes			
Detail	BathBinMaint - Bathroom Bin Maintenance			
Assistant Data	100010000 - 16.03.55 <b>*</b>			
Assignment Date				
Assigned by	Judrida Kessier			
Open Work Orders	Drag a column header here to group by that column       WOCode     Description       W00006229     BathBinMaint - Bathroom Bin Mainte			
en Windows 🕶	User : Julandak 19/01/2022 Ver	sion : 2.5.0.7	Example Cor	mpany v2.5.0.7

• Click on Save.



#### Unfulfilled Part Requests

- When assigning a work order, and unfilled part requests related to the call exists, then you will receive an *Input Validation* message to confirm;
  - There are completed work orders with unfilled 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 unfilled part requests. Refer to Work Orders - Part Requests

<b>•</b> =	Call Assignment	: Reference No. : CN0005296 - BPO: Ve	rsion 2.5.0.7 - Example Compa	ny v2.5.0.7		_ <b> </b>
Home Equ	ipment / Locations Contract Finance / HF	Inventory Maintenance / Projects	Manufacturing Procurement	Sales Service	Reporting Utilities	- 8 ×
Save Back Save L	ayout View Call					\$
Assigned To	Wesley Haynes 👻 *					
Detail	BathBinMant - Bathroom Bin Maintenance - Bin be done due to the bathroom bins being damag	maintenance could not 🕜 •				
Assignment Date	19/01/2022 🔻 16:04:57 🗘 *					
Assigned By	Julanda Kessler 👻 *					
	Create new Work Order 🗹					
Open Work Orders	Drag a column header here to group by that 8 WOCode Description WO0006234 BathBinMaint -	Bathroom Bin Mainte Input Validation There are completed work this call. Do you want to r 10	orders with unfilled part request nove these requests to the new w	× s related to orork order? No		
Open Windows 🕶			User : JulandaK	19/01/2022 Vers	ion : 2.5.0.7 Example	Company v2.5.0.7

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



# Calls - Start Work

<b>\$</b> =	Call Assignment : Reference No. : CN0005296 -	8PO: Version 2.5.0.7 - Example Company v2.5.0.7	_ <b>– x</b>
Home Equ	ipment / Locations Contract Finance / HR Inventory Maintenance / Pro	ojects Manufacturing Procurement Sales Service Reporting Utilities	– & ×
Save Back Save L	ayout View Call		
Process _ Form	at View 4	💀 Requests To Move 🚽 ———————————————————————————————————	_ <b>•</b> x
Assigned To Detail	Wesley Haynes   BathBinMaint - Bathroom Bin Maintenance - Bin maintenance could not  be done due to the bathroom bins being damaged	Home	
		Ok Back Process 1	\$
	· · · · · · · · · · · · · · · · · · ·	Drag a column header here to group by that column	
Assignment Date	19/01/2022 - 16:04:57 + 12	✓         Hd Doc No         Hd Part Code         Hd Part Desc         Hd WO Code         Hd Quantity           ✓         ✓         PQ00005489         WO0006234         2.0000	D
Assigned By	Julanda Kessler 👻 *		
	Create new Work Order 🗹		
Open Work Orders	Drag a column header here to group by that column		
	WOCode Description		
	WO0006234 BathBinMaint - Bathroom Bin Mainte		
	sve Lavout          ver cal         ver cal		
Open Windows 🕶		User : JulandaK 19/01/2022 Version : 2.5.0.7 Example Co	ompany v2.5.0.7

#### **CALL PROCESSING**

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



<b>⊕</b> =	14	4	Time L	ogging Expr	ess - BPO: Version 2.5	.0.7 - Example Co	mpany v2.5.0.7					_ <b>D</b> X
Home Equ	upment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projec	s Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 😤 🗙
0 🛛	3											
Start End Work Pr	int										17	
Process _ Prir	nt 🔒											$\diamond$
Employee	Julanda Kessler		•									
Call	CN0005274	▼ P	ROJ406OR002		*							
					-							
Work Order	WO0006136	▼ P	ROJ406OR002									
					Ψ.							
Equipment					<u>~</u>							
					Ψ.							
Location	Durban North				4. 							
Work Started on work or	rder WO0006136 on t	he 19/01/20	22 at 16:17:30.									
					Cal	Processing -	15		×			
					Ψ.	_	12					
						Call No : CN	10005274 has be	en assign	ed.			
						16		OK				
Open Windows 🕶							User : JulandaK	19/01/20	022 Versi	on : 2.5.0.7	Example Co	mpany v2.5.0.7

- 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.

Ψ					Call Listin	g - BPO: Vers	ion 2.5.1.4 -	v2514 Example Company				- 2
Home Equi	ment / Locations	Contract Fina	ance / HR Invento	ry Maintenance / Pr	ojects Manufi	acturing Pr	ocurement	Sales Service Reporting Utilities				- 8
dd Edit Refresh	My Calls 🔽	Image: Save Layout       Image: Workspaces       Image: Save Filter	My Call     Assign     Start	e Complete Hold	Pending Relea	se Print	Reports					
Find O Hits	r	o to Courter to Courter			(a. 10). (		0.10	B	0.55	0.55		
		Caliketerence	Customenvame	CalDate	Calstate	Technican	Calline	Description	Callype	Call ypeDesc	ErrorLode	ErrorCodeD
Information		Y 10:	100		100	101	η <u>Π</u> ε	4 <b>0</b> 4	10:	100	10:	10c
- Durban		E CN0001033	Young Electric	05/12/2023	Awaiting Ac	David Gray	15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale		
O New		E CN0001030	Hope Works (Pty) Lt	d 28/09/2023	UnAssigned		15:01:06	Instant biling - using selling price	INSP	Inspection		
In Progress		E CN0001029	Hope Works (Pty) Lt	d 28/09/2023	UnAssigned		13:58:24	now with prior and current meter reading with issues.	INSP	Inspection		
() Hold		E CN0001028	Hope Works (Pty) Lt	d 28/09/2023	UnAssigned		13:51:46	Toner yield short fall - batch bill no, yield track yes, on cont	INST	Installation		
Pending			Hope Works (Pty) Lt	d 28/09/2023	UnAssigned		13:38:59	Toner yield test number 2	TON	Toner Required		
Complete			Hope Works (Pty) Lt	d 28/09/2023	UnAssigned		13:10:24	Black toner replacement required	TON	Toner Required		
O All			Top Vehide Hire	28/09/2023	UnAssigned		12:54:20	Black Toner replacement required	INSP	Inspection		
🛛 💽 Pretoria		E CN0001021	Derton / Technologie	s 08/09/2023	UnAssigned		10:36:15	Open sub contracts need to be received.	INSP	Inspection		
New			Derton / Technologie	is 08/09/2023	UnAssigned		10:34:12	Open part requests need to be actioned.	INST	Installation		
<ul> <li>In Progress</li> </ul>		⊞ CN0001019	Derton / Technologie	s 08/09/2023	UnAssigned		10:07:22	New part requests requires approval	INST	Installation		
() Hold			Derton / Technologie	s 07/09/2023	UnAssigned		16:43:54	Call exception - correct and then flag	INST	Installation		
() Pending		E CN0001016	Hope Works (Pty) Lt	d 05/09/2023	UnAssigned		16:36:43	test call sla functionality with contract item that has sla	INSP	Inspection	SERV	Services
Complete			Derton / Technologie	is 15/03/2023	Ended Work	Bianca Du T	15:00:39	Call Closure Exception Functionality Review	ADM	Administration		
O Al		E CN0000992	Top Vehicle Hire		Awaiting Ac	Daniel Balgo	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service		
Cape Town		E CN0000981	Hope Works (Ptv) Lt	d 11/12/2019	Ended Work	Arial Blythe	09:55:00	test placing call on hold	ADM	Administration		
O la Dragraga		E CN0000980	Hope Works (Ptv) Lt	d 21/11/2019	Ended Work	Arial Blythe	12:16:47	Driver Connect - offine test	TON	Toper Required		
C Hold		E CN0000979	Hone Works (Ptv) Lt	d 21/11/2019	Ended Work	Arial Plythe	11:56:31	Third driver connect call	SERV	Service		
() Pending		E CN0000978	Hone Works (Ptv) Lt	4 21/11/2019	Ended Work	Arial Rlythe	11:07:42	Driver Connect - full eat of toners required	DD	Darte Denvirement		
Complete		E CN0000977	Hope Works (Dtu) Lt	d 21/11/2019	Ended Work	Arial Divtha	11:04:46	Driver Connect - toner delivery	CEDV	Capita		
() All		E CN0000077	Dancing Shape	10/11/2010	Ma Signature	Arial Diutha	16:24:55	Test call and functionality	ADM	Administration		
- 🖸 Bloemfontein		E CN0000943	Camanihas Diner		UnArright	Percently UIC	16-31-46	Phase 1 eminment inspection	CM	Crhark lad Maintenance		
New		E CN0000842	Samanthas Diner		UnAssigned		16.21.46	Disso 1 on inmost inspected	CM.	School and Maintenance		
In Progress		E CN0000842	Samanthas Diner		UnAssigned		10:31:40	Phase 1 equipment inspection	5191	Scheduled Maintenance		
🕓 Hold		EP-CN0000841	Toung Electric	11/11/2019	Ended work	bianca DU T	15:07:23	reaciser werbalances ome logging	neos	IVew Dear Sale		
Pending		E CN0000832	nope Works (Pty) Lt	15/10/2019	Accepted	bianca Du T	15:05:26	it seems ince call notes are not saving for call request	UR	Select Call Type		
O Complete		E CN0000822	Telerex	04/07/2019	UnAssigned		09:34:18	test	DR	Select Call Type		
() All		Count: 101										

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