

SERVICE

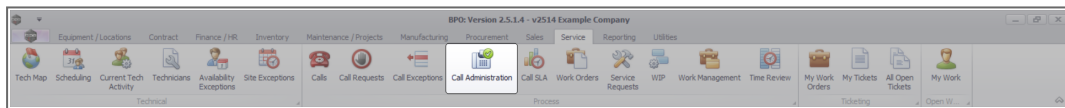
CALL ADMINISTRATION - CALL SALES INVOICES

The Call Administration screen is part of the Extended Call Centre - Version Compatibility¹

The **Invoices** tile is a quick way to navigate to the list of Invoices related to the selected call.

THE CALL ADMINISTRATION LISTING SCREEN

Ribbon Select *Service* > *Call Administration*



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

¹BPO2 v2.5.1.3 or higher.

Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

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

My Call My Call Assign Close Complete Hold Pending Release Reroute Print Reports

State Format Work Process Print Repo

Links: Enter text to search...

Functions: Work Orders 1, Work In Progress, Notes, Assignments 2, Hold History, Pending History, On Site Info, For Contract

CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha	13:26:10	Service machine 5/No: 1912-102036	SERV	Service			19
CH0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har	12:26:58	Machine service required	SERV	Service			53
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo	11:23:30	Test BPO fir tran	NDS	New Deal Sale			
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:30	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi	11:04:32	Machine service required	SERV	Service			ab
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan	16:17:59	Nagenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan	16:21:59	CO789	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jan	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bothes Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			

Count: 381

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- Click on the row selector of the call you would like to work with.

Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

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

My Call My Call Assign Close Complete Hold Pending Release Reroute Print Reports

State Format Work Process Print Repo

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CH0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
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CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi	11:04:32	Machine service required	SERV	Service			ab
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan	16:17:59	Nagenta toner required	TON	Toner Required			19
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CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			

Count: 381

User : Bianca | 09/01/2024 | Version : 2.5.1.4 | v2514Example Company

INVOICES

- Click on the **Invoices** tile.

Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

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

My Calls My Call Assign Close Complete Hold Pending Release Reworkable Print Reports

Links Enter text to search...

On Site Info For Contract Time Review Transactions Invoices Credit Notes

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0001036	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Belinda Sha	10:40:51	Copier service required.	SERV	Service			20
CH0001035	Hope Works (Pty) Ltd	12/12/2023	Unassigned		10:38:38	Copier keeps jamming.	REP	Repair			20
CH0001034	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Blanca Du T...	10:29:04	Full set of toners required.	TON	Toner Required			AT
CH0001033	Young Electric	05/12/2023	Unassigned		15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale			
CH0001032	Young Electric	02/12/2023	Unassigned		12:35:12	Test credit note on work order	MAN	Manufacturing			
CH0001031	Hope Works (Pty) Ltd	29/09/2023	Unassigned		12:56:41	New Deal created from order CH0000306	NDS	New Deal Sale			
CH0001024	Hope Works (Pty) Ltd	12/09/2023	Unassigned		09:23:50	Contract for Expiry Test	NDR	New Deal Rental			
CH0001023	Derton / Technologies	08/09/2023	Unassigned		10:52:25	Open warranty claims have not been processed.	INSP	Inspection			20
CH0001022	Derton / Technologies	08/09/2023	Unassigned		10:44:46	Meters attached with no readings captured	INCT	Installation			20
CH0001017	Derton / Technologies	07/09/2023	Unassigned		16:43:14	Call Exceptions - to correct but not flag.	INCT	Installation			20
CH0001015	Hope Works (Pty) Ltd	05/09/2023	Awaiting Ac.	Blanca Du T...	15:56:53	Test call via functionality	SERV	Service			20
CH0001014	Apple Juice Inc	22/08/2023	Unassigned		11:30:52	Contract Closure - CO0000086	TR	Training			
CH0001012	Panda Copiers	22/08/2023	Unassigned		11:28:32	Contract Closure - CO0000041	DR	Select Call Type			
CH0001011	Young Electric	22/08/2023	Unassigned		11:28:26	Contract Closure - CO0000031	DR	Select Call Type			
CH0001010	Dancing Shoes	22/08/2023	Unassigned		11:28:18	Contract Closure - CO0000001	DR	Select Call Type			
CH0001009	Electric	22/08/2023	Unassigned		11:27:49	Contract Closure - CO0000008	DR	Select Call Type			
CH0001008	Supplies Unlimited	22/08/2023	Unassigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type			
CH0001007	Juke Inc	25/07/2023	Unassigned		10:18:33	Machine inspection required	INSP	Inspection			
CH0001006	Works (Pty) Ltd	07/06/2023	Awaiting Ac.	Blanca Du T...	11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	50
CH0001005	Works (Pty) Ltd	07/06/2023	Unassigned		10:14:52	Walls require repainting	SM	Scheduled Maintenance	SERV	Services	10
CH0001002	Santalitas Diner	12/12/2022	Awaiting Ac.	Ann Milton	10:09:10	Test account balances	DR	Select Call Type			19
CH0001001	Young Electric	29/11/2022	Unassigned	Mary Thom	16:18:30	Test call for account balances manual.	DR	Select Call Type			
CH0000996	Hope Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
CH0000991	Apple Juice Inc	24/10/2022	Unassigned		16:38:15	Contract Closure - CO0000054	ADM	Administration			

Count: 377

User : Blanca 15/01/2024 Version : 2.5.1.4 v2514 Example Company

- The **Invoices** listing screen will open displaying the Invoices related to the selected call.

Sales Invoices for Call CH0001004 - BPO Version 2.5.1.4 - v2514 Example Company

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Add Edit Comment and Reference View Save Layout Workspaces Print Send Invoices To Print Queue Export Refresh

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Functions Issues

InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	SalesmanName	Status
INV0000526	DEK001	Derton / Technology	Test	458.96	ZAR	1.00	15.00	18/05/2023	P	DU7001	Blanca Du Test	A

User : Blanca 07/12/2023 Version : 2.5.1.4 v2514 Example Company



For a detailed handling of this topic refer to Calls - Invoice a Call

Related Topics

- [Service - Introduction to Call Administration](#)
- [Call Administration - Edit a Call](#)
- [Call Administration - My Calls](#)
- [Call Administration - Assign a Call](#)
- [Call Administration - Start or End Work](#)
- [Call Administration - Close a Call](#)
- [Call Administration - Complete a Call](#)
- [Call Administration - Hold a Call](#)
- [Call Administration - Pend a Call](#)
- [Call Administration - Release a Call](#)
- [Call Administration - Reinstate a Call](#)

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