

SERVICE

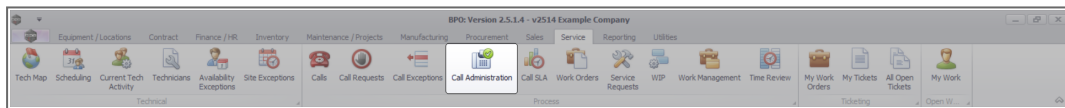
CALL ADMINISTRATION - CALL SALES CREDIT NOTES

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

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

THE CALL ADMINISTRATION LISTING SCREEN

Ribbon Select *Service* > *Call Administration*



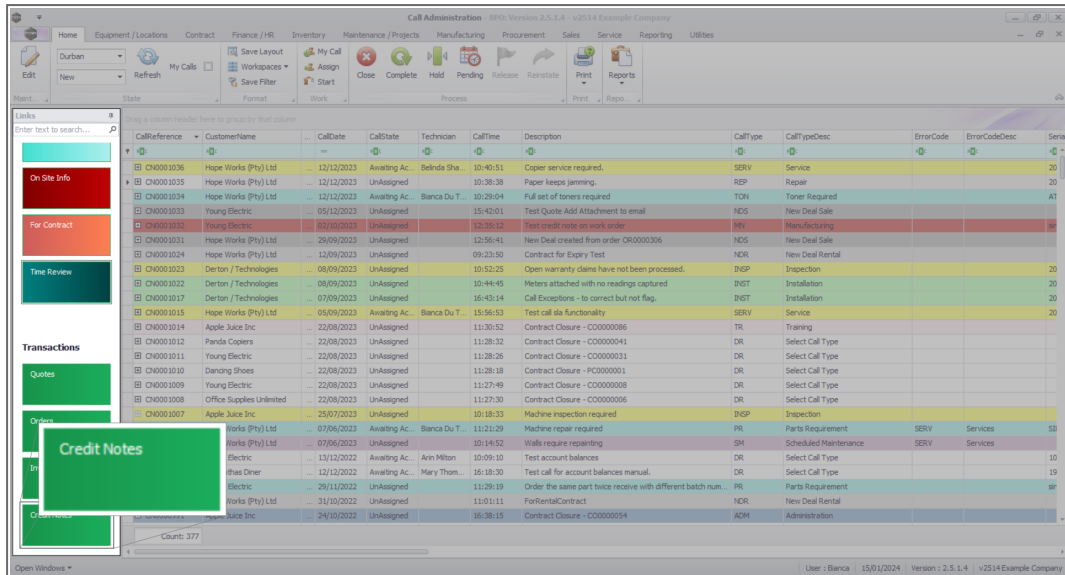
- The **Call Administration** screen will be displayed.

¹BPO2 v2.5.1.3 or higher.

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

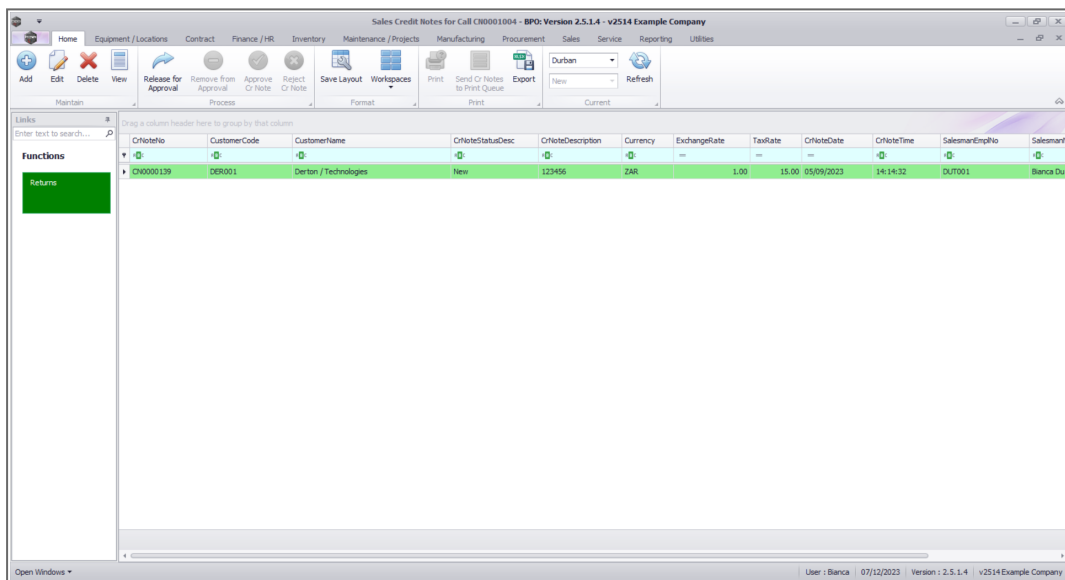
CREDIT NOTES

- Click on the **Credit Notes** tile.



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	Paper 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	02/10/2023	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	Young Electric	22/08/2023	Unassigned		11:27:49	Contract Closure - CO0000008	DR	Select Call Type			
CH0001008	Office Supplies Unlimited	22/08/2023	Unassigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type			
CH0001007	Apple Juice 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	PM	Scheduled Maintenance	SERV	Services	10
CH0001004	Electric	12/12/2022	Awaiting Ac.	Ann Milton	10:09:10	Test account balances	DR	Select Call Type			19
CH0001003	Ihes Diner	12/12/2022	Awaiting Ac.	Mary Thom	16:18:30	Test call for account balances manual.	DR	Select Call Type			
CH0001002	Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	PR	Parts Requirement			
CH0001001	Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
CH0001000	Juice Inc	24/10/2022	Unassigned		16:38:15	Contract Closure - CO0000054	ADM	Administration			

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



CH0Note	CustomerCode	CustomerName	CH0NoteStatusDesc	CH0NoteDescription	Currency	ExchangeRate	TaxRate	CH0NoteDate	CH0NoteTime	SalesmanEmpId	Salesman
CH0000139	CH0001	Derton / Technologies	New	123456	ZAR	1.00	15.00	05/09/2023	14:14:32	OUT001	Blanca Du



For a detailed handling of this topic refer to Calls - Add a Credit Note

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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