

## **BPO INSIGHT**

## **EXCEPTION REPORT DETAIL**

The exception report dashboard will display as configured for the employee.

Drill down into the reports to see the details for the exception report.

**Ribbon Access:** BPO Insight> Configuration

• Click on the Report you want to view





 The report will open for you to view. You can filter the report to find specific information. In this example I have a couple of Open Calls where the Work Orders are closed - so I can just go into BPO and close these calls.



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W00000178 test	st	357	SERV	0	3	16 Jul 2014	14:25:09	No	CN0000035	test	Bianca Du Toit
WO0000244 Ton max ser	ner for livery and schine rvice	288	SERV	0	2	23 Sep 2014	13:49:09	No	CN0000071	Toner for delivery and machine service	Bianca Du Toit
W00000251 Max	ichine rvice quired	285	SERV	0	2	26 Sep 2014	09:17:39	No	CN0000074	Machine service required	Bianca Du Toit
WC0000459 Set add	t up new val dresses	132	п	М	2	26 Feb 2015	11:40:09	No	CN0000117	Set up new email addresses	Bianca Du Toit
W00000474 bed	st	124	INST	0	2	06 Mar 2015	15:45:25	No	CN0000130	test	Bianca Du Toit

## **EMAIL REPORT**

- Select the 'Export' format for the report.
- Click on the 'Email' button.



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• Some details will be filled in for you, but you can add to the Subject / Body of the email.



Send R	leset Cancel	
om:	John Smith [john@ernail.co.za]	
tachment:	Current report will be attached as a document in selected format	
bject:	Open Calls: Work Orders Closed	
inn smith ilephone: 03	1 123 4564	3

- Click in the 'To:' field to bring up the list of employees from BPO
- Select the employees you want to send the report to.
- Click on 'Send'.



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Send Res	et Cancel	
To:	John Smith [john@email.co.za]	4
From: Attachment: Subject:	☑John Smith [john@email.co.za] □Belinda Sharman [Belinda@email.co.za]	
Hi Please find Ope Kind regards,	Chris Harris [Chris@email.co.za]  Susan Baldwin [Susan@email.co.za]  Karlien Young [Karlien@email.co.za]  George Reddy [George@email.co.za]	
John Smith Telephone: 031	Cari Lourens [Cari@email.co.za] John Twain [John@email.co.za] Mark Stevnson [Mark@email.co.za] Mike Johnson [Mike@email.co.za]	
	Luke Drummond [luke@email.co.za]	
	Jerry View [Jerry@email.co.za]	

## **EXPORT REPORT**

- Select the 'Export' format for the report.
- Click on the 'GO' button.



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W00000474	test	124	INST	0	2	06 Mar 2015	15:45:25	No	CN0000130	test	Bianca Du Toit
W00000474	test	124	INST	0	2 Current I	06 Mar 2015 User: NBDB001	15:45:25 I/John	No	CN0000130 C 2013		Bianca Du Toit

- Select to 'Save' file or 'Open' with another application, and then click on 'Ok'.
- If you are saving, you will have the option to select where to save the file.
- Note: you will need access to this folder on the server: C:\Program Files (x86)\CO3 Technologies\BPOConnect\BPOInsight\Tmp



• *Also*: make sure that your web browser doesn't block the pop-up below, else you won't be able to save.

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