

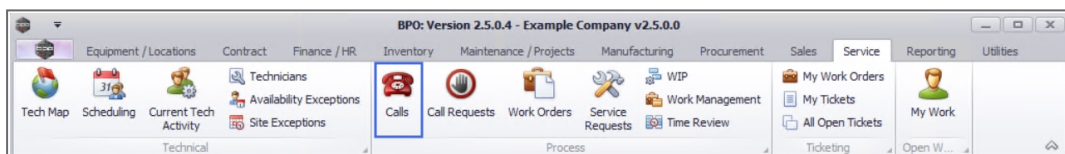
SERVICE

CALLS – THE EDIT BUTTONS

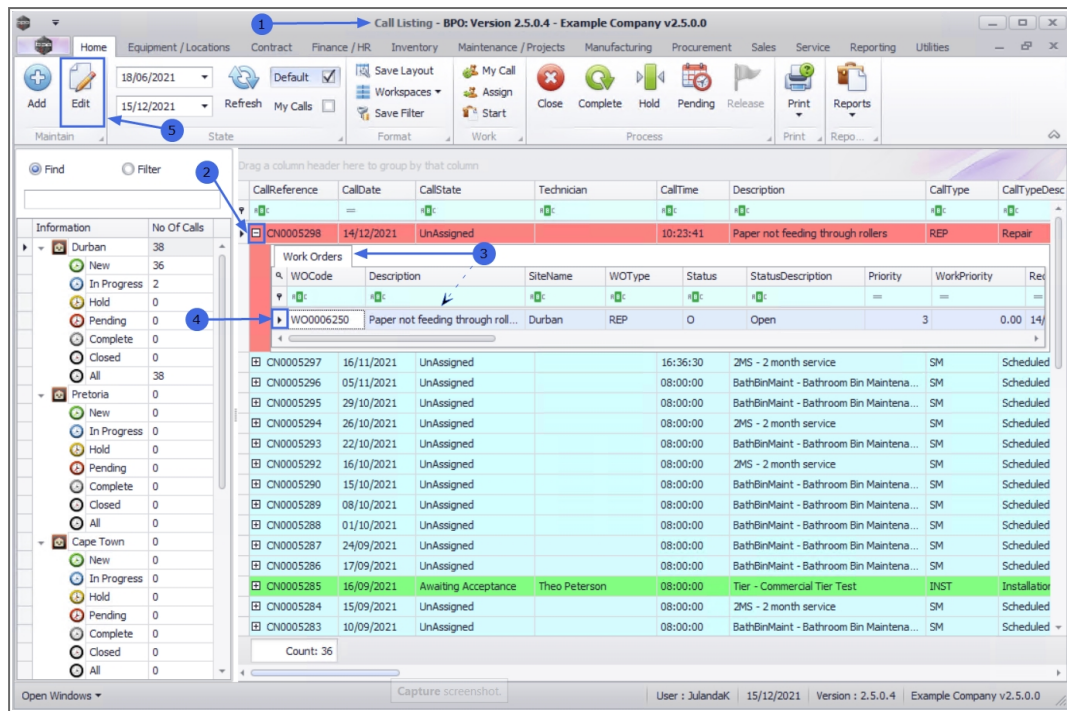
When a call is saved, BPO automatically generates a Work Order for the call that holds all the information logged against the call.

If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can update the details directly in the call screen, by clicking on the **Edit [...]** (ellipsis) buttons in the relevant fields.

Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.
2. Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
3. The **Work Order data grid** will be **expanded** to display the generated **work order number** and all the information for the call log.
4. Click in the **row** of the Work Order you wish to edit.
5. Click on **Edit**.



6. The **Call maintenance** screen will be displayed.

EDIT CUSTOMER INFO

7. Click on the **Edit [...]** (ellipsis) button in the **Customer** field.

Call maintenance : Call ref. - CN0005298 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Customer: Hope Works (Pty) Ltd

Contact: Kelly Jones

Contact No.: 031 123 4567

Address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

Call Type: Repair

Error Code: Paper Jam

Description: Paper not feeding through rollers

Call Date Time: 14/12/2021 10:23:41

Priority: 3

SLA:

Date Required: 14/12/2021

Order No: PO12345

Logged By: JulandaK

Status: N - New

Optional No: ACCTS002

ReferenceType	ReferenceNo
Serial No	1020-10101
Prior Call Reference	
Call Request Reference	
Contract No	CO0000050
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

CallReference	CallDate	CallTime	Description
CN0005298	14/12/2021	10:23:41	Paper not feeding through rollers
CN0000543	17/11/2017	13:15:48	test call swap out po status
CN0000519	07/08/2017	14:19:10	Full set of toners required
CN0000516	03/08/2017	15:21:01	Test all functions on the copier
CN0000510	13/07/2017	08:45:37	Test call for invoice and transaction processing checks
CN0000501	29/06/2017	16:14:01	Loan unit - Alternate Issue
CN0000647	23/05/2017	08:00:00	TT010 - Daily, Colour 1000 - Call per WO

8. The **Customer Maintenance** screen will be displayed.
9. Edit the details for the customer and click on **Save** to return to the **Call maintenance** screen.

Customer Maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Type: Retail

Customer Code: HOP001

Customer Name: Hope Works (Pty) Ltd

Credit Limit: 5000

Web Site: www.hopeworks.co.za

Phone No.: 031 123 4567

Tax Rate: 15.00

VAT No.: 987654321

Registered Name: Hope Works (Pty) Ltd

Registration No.: 123456789

Holding Company: No Holding Co

Currency: South African Rand

Account Code:

Credit Check: No Check

Credit Terms: 30 Days

Reporting Area: Durban

Salesman: Bianca Du Toit

Account Manager: Bianca Du Toit

Is Debtor: ☒

Is Consolidated: ☐

Send SMS: ☐

Send Email: ☒

Primary Contact: Mandy Jefferson

Email Address: snerhlanthandwalane@gmail.com

Invoice Method: Print and Email

☒ Primary is Accounts Contact

Accounts Contact: Mandy Jefferson

Email Address: snerhlanthandwalane@gmail.com

Billing Address: PO Box 7452, Forest Hills, New Town, Durban South, South Africa

Bill Postal Code: 1234

☐ Copy Billing to Shipping

Physical Address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South, South Africa

Postal Code: 1234

Trading As Name: Hope Works

Shift Pattern: Normal Week

Rank: Gold

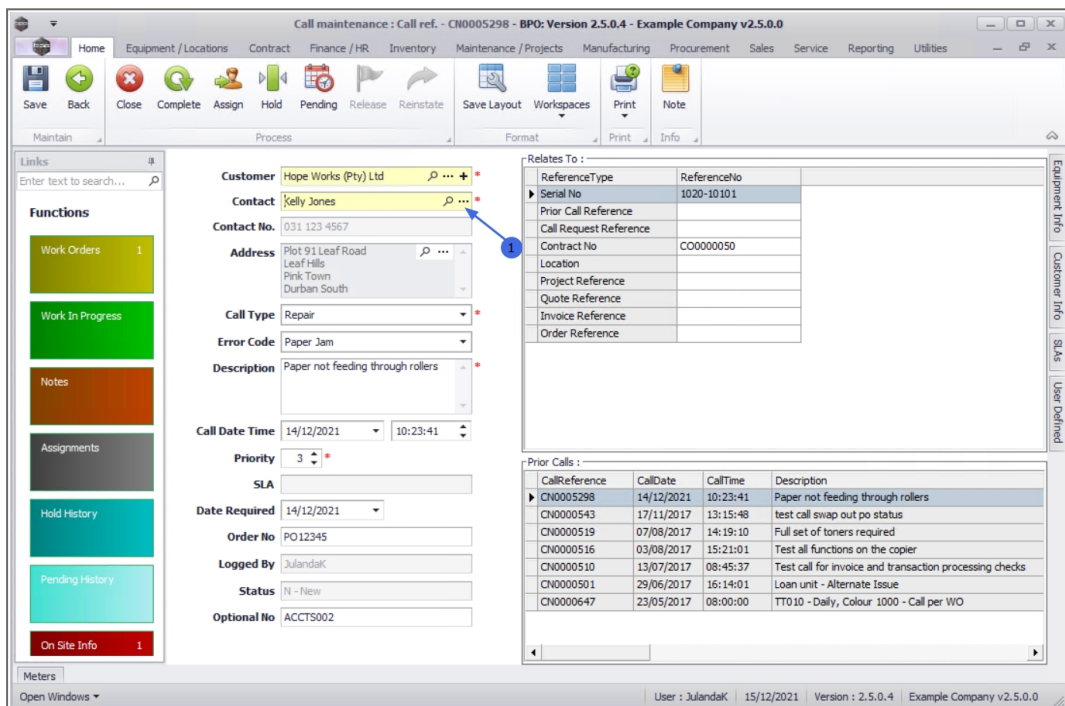
ADD NEW CONTACT

When you are initially selecting the contact for the call log in the Call Maintenance screen, it may be that your contact is not listed. You can **add** a new contact directly from the Call maintenance screen.



Note that this contact should be set up as a **Standard Contact**. For additional help with this process, refer to [Calls - Add New Contact](#).

1. Click on the **Edit [...]** (ellipsis) button in the **Contact** field.



Call maintenance : Call ref. - CN0005298 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Customer: Hope Works (Pty) Ltd

Contact: Kelly Jones

Contact No.: 031 123 4567

Address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

Call Type: Repair

Error Code: Paper Jam

Description: Paper not feeding through rollers

Call Date Time: 14/12/2021 10:23:41

Priority: 3

SLA:

Date Required: 14/12/2021

Order No: PO12345

Logged By: JulandaK

Status: N - New

Optional No: ACCTS002

Relates To:

ReferenceType	ReferenceNo
Serial No	1020-10101
Prior Call Reference	
Call Request Reference	
Contract No	CO0000050
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls:

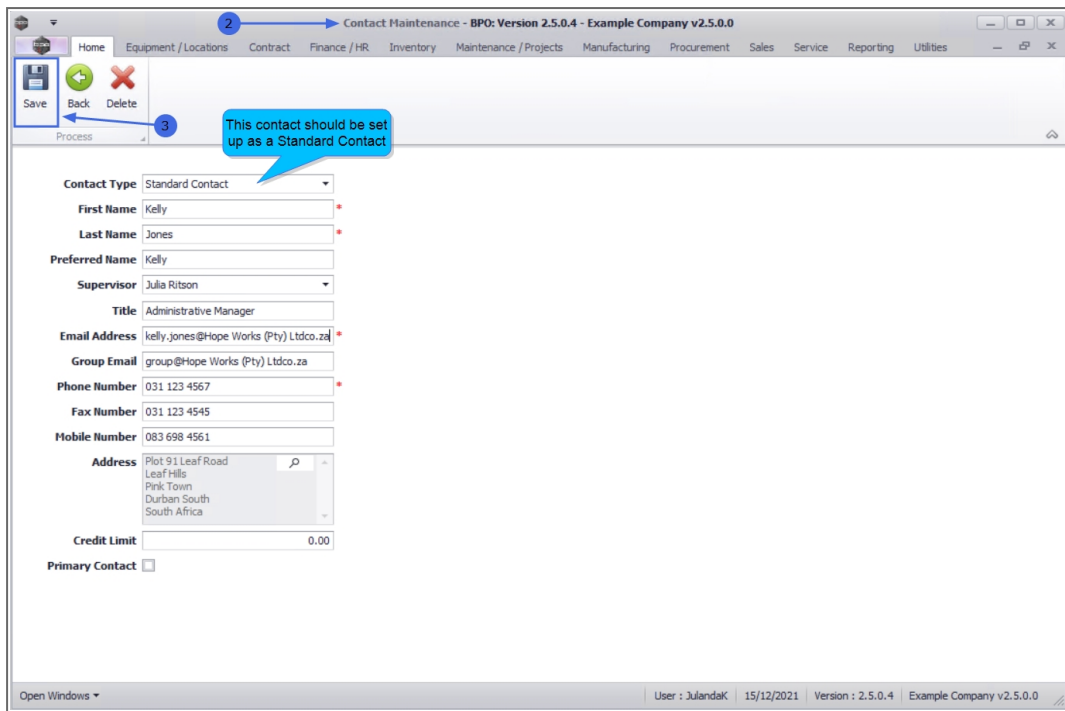
CallReference	CallDate	CallTime	Description
CN0005298	14/12/2021	10:23:41	Paper not feeding through rollers
CN0000543	17/11/2017	13:15:48	test call swap out po status
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CN0000647	23/05/2017	08:00:00	TT010 - Daily, Colour 1000 - Call per WO

Metres:

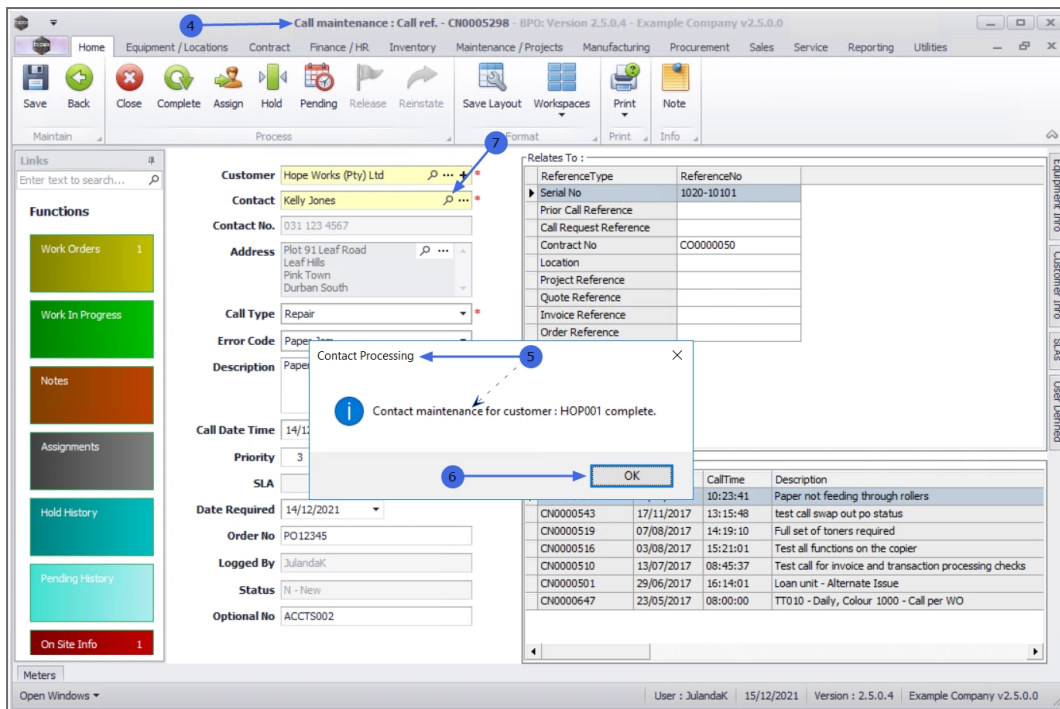
Open Windows:

User: JulandaK 15/12/2021 Version: 2.5.0.4 Example Company v2.5.0.0

2. "The Contact Maintenance screen will be displayed." on page 3
3. Add the contact details as required and click on **Save**.

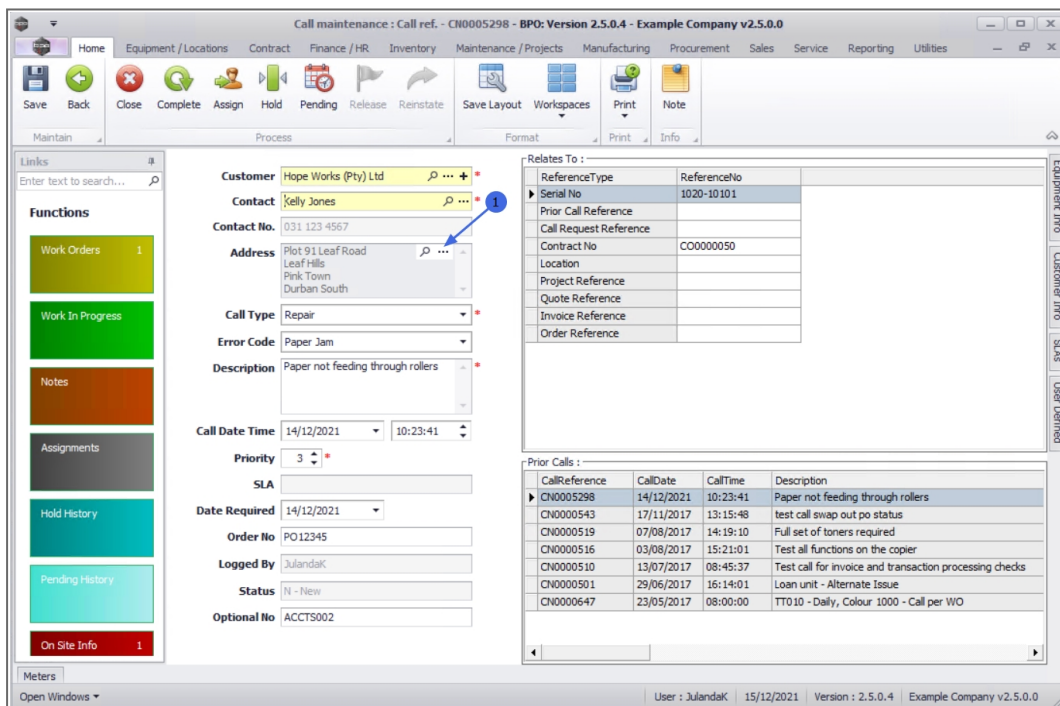


4. You will return to the **Call maintenance** screen.
5. When you receive the **Contact Processing** message to confirm that;
 - **Contact maintenance for customer : [customer code] complete.**
6. Click on **OK**.
7. The new contact will now be available when you use the **search** button in the Contact field.

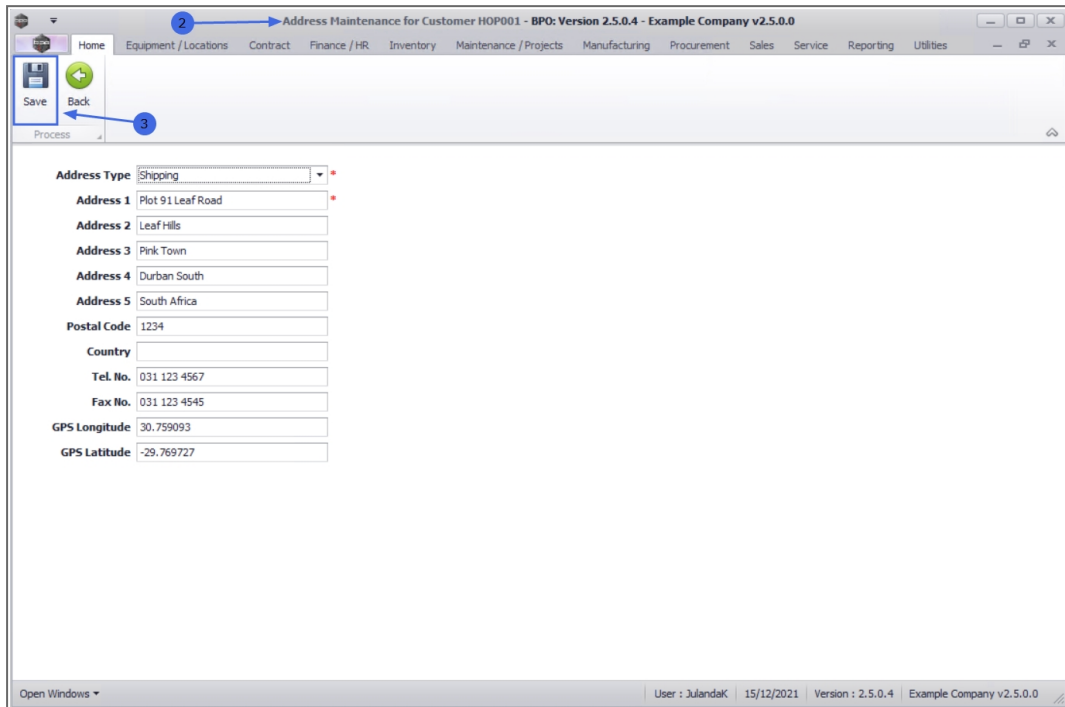


EDIT CUSTOMER ADDRESS

1. Click on the **Edit [...]** (ellipsis) button in the **Address** field.



2. The **Address Maintenance for Customer** screen will be displayed.
3. Make the necessary changes to the address as required, then click on **Save**.



4. You will return to the **Call maintenance** screen.
5. When you receive the **Address Processing** message to confirm that;
 - **The address: [customer address] for customer has been saved.**
6. Click on **OK**.

Call maintenance : Call ref. - CN0005298 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links
Enter text to search...

Functions
Work Orders 1
Work In Progress
Notes
Assignments
Hold History
Pending History
On Site Info 1

Customer Hope Works (Pty) Ltd
Contact Kelly Jones
Contact No. 031 123 4567
Address Plot 91 Leaf Road
Leaf Hills
Pink Town
Durban South
Call Type Repair
Error Code
Description Address Processing
Call Date Time
Priority
SLA
Date Required 14/12/2021
Order No PO12345
Logged By JulandaK
Status N - New
Optional No ACCTS002

Relates To :
ReferenceType ReferenceNo
Serial No 1020-10101
Prior Call Reference
Call Request Reference
Contract No CO0000050
Location
Project Reference
Quote Reference
Invoice Reference
Order Reference

The address : Plot 91 Leaf Road for customer HOP001 has been saved.

OK

Time	Description
17/11/2017 13:15:48	test call swap out po status
07/08/2017 14:19:10	Full set of toners required
03/08/2017 15:21:01	Test all functions on the copier
13/07/2017 08:45:37	Test call for invoice and transaction processing checks
29/06/2017 16:14:01	Loan unit - Alternate Issue
23/05/2017 08:00:00	TT010 - Daily, Colour 1000 - Call per WO

Meters
Open Windows

Capture screenshot. User : JulandaK 15/12/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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