

We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS - LOCATIONS

A Customer Location can be created when using the system to keep track of, and bill clients, on services relating to items that are <u>not</u> serialised assets, e.g. building maintenance / cleaning and hygiene maintenance / security services.

A customer location can be created in the **Customer Listing** screen or **Functional Locations** screen.

To add scheduled maintenance tasks to a customer location - you will need to edit the location in the Functional Location screen.

A customer location can be linked to a contract for billing.

Ribbon Access: Sales > Customers



- 1. The **Customer Listing** screen will be displayed.
- 2. Select the Site where the customer can be located.
 - The example has **Durban** selected.
- 3. Select the **row** of the **customer** whose locations you wish to view.
- 4. Click on the **Locations** tile.



7					1		Custom	er Listing - Bl	PO: Version	2.4.0.11 - Exar	nple Company			
	Home	e Equip	ment	Locations	Contract	Finance / HR	Inventory	Maintenand	e / Projects	Manufacturin	ng Procurement	Sales Service	Reporting Utilities	- 8
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				4AN0001	RE	Mandy Norton				Durban	0.0	0		0
Comr	nercial										010			

ADD MAIN LOCATION

- 5. The **Functional Locations for Customer [**customer code**]** screen will be displayed.
- Confirm that the correct Site has been selectFunctional Locations for Customer [ed before continuing.
- 7. Click on Add.

Short cut key: Right click to display the All groups menu list. Click on Add.





- 8. When you receive the Add Location message requesting;
 - Do you wish to add a sub location?
- 9. Select **No** for creating the Main Location.

Note: Select **Yes** only if you have already set up the <u>main</u> location, and you are creating the <u>sub</u>-locations beneath it.



	Functio	onal Locations for Customer HOP001 - BPO: Version 2.4.0.11 - Example Company			x
Home Equipment	/Locations Contract Finance / HR	Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities	-	8	×
Add Edit Delete Work	spaces Export	Refresh			
Process _ Form	nat _ Export _ Current				\diamond
Links #	Locations				
Enter text to search 🔎 💡					
Functions +	Forest Hills Centre				_
Technical	Pine Willows Centre				
Specifications	Jolly Farm Centre				
	Silver Birch Centre				
Additional Data	Lilies Quarter Centre				
	NewHopeMall				
	NON CLIENT BPOV2 TEST	Add location			
Documents	BPO2 TEST 1				
	> 🏠 BPO2 Test 7	Do you wish to add a sub location ? 🕊 👘			
WO History	BPO2 Test 2				
	BPO2 Test 3	Yes No 9			
	> 🏠 BPO2 Test 4				
Failure Analysis	Kloof Corner Mall				
	WaterCrest Village Mall				
Warranty					
Maintenance Methodology					
Open Windows 🕶		User: JulandaK 19/01/2021 Version: 2.4.0.11 Exam	ple Com	pany	11.

10. The Add new functional location screen will be displayed.

LOCATION DETAILS

- Site: The site will auto populate with your original site selection.
- **Location:** Type in a description of the Main Location, for example the name of the building name.
- **Customer:** The customer will auto populate with the name of the customer selected on the Customer listing screen.
- You have the option to change the customer by clicking on the **search** button, to select an alternative customer, if required.
- **Type:** Type will link the relevant **type** items to this location, for example Software, Equipment, etc.
- To select the type, click on the search button to display the Select the type for this Location screen to select and add the type applicable.



- **Class:** Class will link the relevant **class** items to this location, for example if you have selected Software as the type, then you can further specify Internal or External software.
- To select the class item, click on the search button to display
 Select the class for this Location screen, to select and add the relevant class item.
- **Category:** The category will link the relevant items to categorise this location.
- To select the category, click on the search button to display the **Select the category for this Location** screen, to select the applicable category.
- Priority: Select the work order priority¹ for this location from 1-5.

WORK ORDER

In the Work Order frame, tick the check boxes, as required:

- **Tasks:** Tasks for the location will be linked to the task instructions on the Work Order when the check box has been selected, for instance, Clean Machine. Refer to **Work Orders - Task Instruc**tions
- WO Notification: A Work Order notification will be sent for scheduled tasks when the check box has been selected. Refer to Work Orders Maintenance
- WO Default Item: The Default settings will apply to Work Orders for this Customer location, as set out in the Work Order Management. Refer to Introduction to Work Management

11 = Most Important and 5 = Lease Important



PHYSICAL LOCATION

In the Physical Location frame:

• Location Lines 1-4: Type in the Address / Location information, as required using the available fields.

CUSTOMER SPECIFIC DATA

- Shipping Address: To select the shipping address, click on the search button to display the Select the shipping address for this customer screen, to select and add the shipping address for the location.
 - A new company config flag (AutoUpdateShippingAddress) is available in BPO2 v2.5.0.8 (or higher) / Nucleus Service to control automated shipping address updates in the system between contract items and equipment shipping addresses/ functional location shipping address and ensures the shipping address correlates to contract items shipping address. When you update the shipping address on a contract the shipping address will reflect on the asset or functional location. If the user updates the asset or functional location's shipping address, the shipping address will reflect on the contract item.
- **SLA Hours¹:** Specify the Service Level Agreement for the Customer Main Location.

¹This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).



SAVE LOCATION

11. When you have completed adding the information for the Main Location, click on **Save**.

		Add new f	unctional loca	ation - BPO: Version 2.4.0.1	1 - Example Company				_ □ ×
Home Equipmen	nt / Locations Contract	Finance / HR Invento	ory Mainten	nance / Projects Manufact	uring Procurement	Sales Servi	ce Reportin	g Utilities	- & ×
Save Back									
Process 11									\diamond
Links									
Enter text to search P				Physical Location					
	Site	Durban	•						
Functions	Location	Riverdale Ranch	÷.	Location Line 1 R	iverdale Gardens				
Technical			Ŧ	Location Line 2 E	ast Twickenham				
Specifications	Component			Location Line 3	urban				
	Parent Location		÷	Location Line 4 K	waZulu Natal				
Additional Data	Customer	Hone Works (Ptv) Ltd	Q						
	Тупе	Software	0 *	Customer Specific Data					
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Documents	Class	Desktee Application	0 *	SLA Hours	3				
	Category	Desktop Application	7		-				
	Priority	2 📮							
WO History	Work Order								
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Maintenance									
Methodology									
Open Windows 🔻						User : JulandaK	19/01/2021	Version : 2.4.0.11	Example Company

- 12. When you receive the **Functional Location** message informing you that;
 - The location: [functional location name] has been saved.
- 13. Click on OK.





14. You can now view the newly added location in the **Functional Locations for Customer** screen.

		Functional Loca	tions for Customer HOP001 -	BPO: Version 2.4.0	.11 - Example Co	ompany			>
Home Equipm	nent / Locations Contract	Finance / HR Inver	tory Maintenance / Projects	Manufacturing	Procurement	Sales S	ervice Rej	porting Utilities	- 8)
Add Edit Delete V	Workspaces Export	Durban • Refres	1						
Process 4	Format _ Export _	Current	4						6
Links #	Locations								
Enter text to search p	P								
Functions	Forest Hills Cent	re							
Technical	Pine Willows Cen	ntre							
Specifications	Jolly Farm Centre	e							
	 Silver Birch Cent 	re							
Additional Data	Lilies Quarter Ce	entre							
	NewHopeMall								
Description	NON CLIENT BPC	OV2 TEST							
Documents	BPO2 TEST 1								
	 BPO2 Test 7 								
WO History	BPO2 Test 2								
	BPO2 Test 3								
	 BPO2 Test 4 								
Failure Analysis	▶ 🏠 Kloof Corner Mal	L							
	WaterCrest Villa	ge Mall							
Warranty	Riverdale Ranch		14						
Maintenance Methodology									
Open Windows 🔻						User : Juland	aK 19/01/20	021 Version : 2.4.0	.11 Example Company



ADD SUB-LOCATION

To set up a second level of Locations,

- 1. From the Functional Locations for Customer [customer code] screen,
- 2. Ensure that the correct **Site** has been selected.
- 3. Select the **row** of the main location you wish to ad d a sub location(s) to.
 - The example has **Riverdale Ranch** selected.
- 4. Click on Add.

Short cut key: Right click to display the All groups menu list. Click on Add.

5. When you receive the Add Location message requesting;

• Do you wish to add a sub location?

6. Click on Yes.





7. The **Add new functional location** screen will be displayed.

ADD SUB-LOCATION DETAILS

Update the details for the **Sub-location** as you would for the **Main Location**.

Location: Mhen entering the location for a sub-location, it

will help you to identify it later if the **Main Location description** forms part of the **Sub-location description**.

• **Parent Location:** This field will auto populate with the Main Location you initially selected.

WORK ORDER

In the Work Order frame, tick the check boxes, as required:

- Tasks: Tasks for the location will be linked to the task instructions on the Work Order when the check box has been selected, for instance, Clean Machine. Refer to Work Orders - Task Instructions
- WO Notification: A Work Order notification will be sent for scheduled tasks when the check box has been selected. Refer to Work Orders - Maintenance
- WO Default Item: The Default settings will apply to Work Orders for this Customer location, as set out in the Work Order Management. Refer to Introduction to Work Management

SAVE SUB-LOCATION

 When you have finished updating the Sub-location details, click on Save.





- 9. When you receive the **Functional Location** message to confirm that;
 - The location: [functional sub-location name] has been saved.
- 10. Click on OK.





11. Click the **expand** icon next to the **Main Location** to view the **Sub-location** you have created.





Continue adding sub-locations as required, until you have your whole set up completed

Note 1: Make sure you have selected the correct Main (Parent) Location before adding a Sub-location

Note 2: You only need to link the Main Location, if you are going to add this location tree, to a contract.

EDIT LOCATION

Changes can be made to a Main Location, Parent or Sub-location.

- 1. From the Functional Locations for Customer [customer code] screen,
- 2. Ensure that the correct **Site** has been selected.



- 3. Select the **row** of the **Main**, **Parent** or **Sub-location** that you wish to **edit**.
- 4. Click on Edit.

Short cut key: Right click to display the All groups menu list. Click on Edit.



- 5. The **Edit functional location-** [customer code] screen will display.
- 6. Make the necessary changes to the location information as required.
 - The example has an addition to the Physical Location, Line 4.
- 7. Click on **Save** to update the Location information.



⇒ → →	Edit functional location - BP	0: Version 2.4.0.11 - Exam	nple Company			_ D X
Home Equipment / Locations Contract	Finance / HR Inventory Mair	tenance / Projects Manu	facturing Procurer	ment Sales	Service Rep	or®i — 🗗 🗙
Save Back 7					6	۵
Links #					/	
Enter text to search 2 Site	Durban	 Physical Locat 	ion		1	
Functions Location	Riverdale Ranch	 Location I 	ine 1 Riverdale G	ardens	<i>i</i>	
Technical		Location I	ine 2 East Twicker	nham ,′		
Specifications Component		Location	ine 3 Durban	k		
Parent Location		Location I	.ine 4 KwaZulu Na	tal,3600		
Additional Data Customer	Hope Works (Pty) Ltd					
Туре	Software	Customer Spe	cific Data			
Documents Class	Software Internal	Shipping Add	Iress Plot 91 Leaf	f Road, Leaf Hill	s P	
Category	Desktop Application	sla i م	lours 3			
Priority	2 🛊 *					
WO History Work Order		¬				
Tarka	WO Notification					
	✓ WO Notification					
Failure Analysis	t item					
Warranty						
Maintenance Methodology						
Open Windows -			User : JulandaK	20/01/2021	Version : 2.4.0.11	Example Company

- 8. When you receive the **Functional Location** message to confirm;
 - The location : [functional location name] has been saved.
- 9. Click on OK.



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Links A	Locations	-Aport -	4 00	rent	4								
Enter text to search	ο _φ												
Functions	Fore	st Hills Centre	e										
	Pine	Willows Cent	te										
Technical Specifications	> 🏠 Jolly	Farm Centre											
	> 🏠 Silve	Birch Centre	e										
Additional Data	1 Lilies	Quarter Cen	ntre										
	1 New	HopeMall											
Description		CLIENT BPO	V2 TEST		Functio	nal Location 🚽	8		×				
Documents	👘 вро	TEST 1					1						
	► 1 BPO	2 Test 7				The location : Riv	verdale Ranch ha	s been save	ł.				
WO History	BPO	2 Test 2											
	► 1 BPO	2 Test 3				-							
	BPO	2 Test 4				9—		OK					
Falure Analysis	Kloo	Corner Mall											
	👚 Wat	erCrest Villag	e Mall										
Warranty	> 🏠 Rive	dale Ranch											
	Rive	dale Ranch											
Maintenance Methodology													
Open Windows 🕶				an Sama an S			User : Julandał	K 25/10/20	21 Ven	sion: 2.5.0.4	Example Co	ompany v2.	5.0.0

DELETE LOCATION

Note that you will <u>not</u> be able to remove / delete a Customer Location with;

- Open Work Orders or Active Contracts linked to it,
- or a Parent Location with Sub-Locations.
- 1. From the Functional Locations for Customer [customer code] screen,
- 2. Select the **row** of the **Customer Location** that you wish to remove.
 - The image has **Riverdale Ranch Green Roof Warehouse** selected.
- 3. Click on **Delete**.

Short cut key: Right click to display the All groups menu list. Click on Delete.



- 4. When you receive the **Delete Location** message to confirm;
 - Are you sure you want to delete this location: [functional location name]
- 5. Click on **Yes** if you are certain about your selection.

	er HOP001 - BPO: Version 2.4.0.11 - Example Company
Home Equipment / Locations Contract Finance / HR Inventory	Maintenance/Projects Manufacturing Procurement Sales Service Reporter — 🗗 🛪
Add Edit Delete Workspaces Export Durban Refresh	
Links # Locations	
Enter text to search 🔎 📍	
Functions Image: Control of the second s	Delete Location X Are you sure you want to delete this location : Reference : Riverdale Ranch Green Roof Warehouse
Failure Analysis > Image: Second Se	5 Yes No
Open Windows -	User : JulandaK 20/01/2021 Version : 2.4.0.11 Example Company

CUSTOMER LOCATION SERVICE HISTORY REPORT

The service history report displays the activities done for a location. This report can also be generated from the Call Listing screen. Refer to "Calls - Functional Location Service History Report" on page 1

- 1. From the Functional Location for customer [customer code] screen,
- 2. Click on the **row** of the customer location you wish to print the service history report for.



- 3. Click on **Print**.
- 4. Click on Customer Location Service History.

\$ -	Functional Locations for Customer H0P001 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8	. • ×
Home Equipment / Lo	cations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities	_ & ×
Add Edit Delete Workspa	aces Export Print Durban Refresh	
Process "Format	Expe	\$
Links 2 A Lo	ocations	
Enter text to search 🔎 📍		
Functions	Forest Hills Centre	
Technical	Pine Willows Centre	
Specifications	ally Farm Centre	
· · · · · · · · · · · · · · · · · · ·	Silver Birch Centre	
Additional Data	Liles Quarter Centre	
	The NewHopeMall	
	NON CLIENT BPOV2 TEST	
Documents	BPO2 TEST 1	
· · · · · · · · · · · · · · · · · · ·	BP02 Test 7	
WO History	BP02 Test 2	
•	PO2 Test 3	
,	PP02 Test 4	
Failure Analysis	Correr Mall	
	WaterCrest Village Mall	
Warranty	The Riverdale Ranch	
	The Riverdale Ranch	
Maintenance Methodology		
Open Windows 🔻	User : JulandaK 08/04/2022 Version : 2.5.0.8 Example Company	v2.5.0.8

- 5. When you receive the **Report Generation** message to confirm;
 - Do you want to print the Customer Location Service History Report for location "[location name]"?
- 6. Click on **Yes**.



	Functional Locations for Customer H0P001 - BPO: Version 2	2.5.0.8 - Example Company v2.5.0.8
Add Edit Delete	Vorkspaces Format Forma	unacturing Procurement sales service keporting Unites — EP 3
Links 4	Locations	
inter text to search 🖇	•	
Functions Technical	forest Hills Centre Pre Willows Centre A July Form Centre	
	Silver Birch Centre	
Additional Data	Ilies Quarter Centre NewHopeMall Report Generation	×
Documents	NON CLIENT BPO21 BPO2 TEST 1 Do you want to print the Customer Location Service location 'Forest Hills Centre'?	: History Report for the
WO History		es No
Failure Analysis	BPO2 Test 4 Moof Corner Mall	
Warranty	WaterCrest Vilage Mail Riverdale Ranch Riverdale Ranch	
Maintenance Methodology		
en Windows 🕶		User : JulandaK 08/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

- 7. The Customer Location Service History Report will display in the **Report Preview** screen.
- From this screen you can make cosmetic changes to the document, as well as Save, Zoom, Add a Watermark, Export or Email the Customer Location Service History Report.
- 9. Click on **Close** to return to the **Functional Location List** screen.



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File View Background					7*
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			Customer Lo	ocation Service History	
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			Area	NewTown	
	Com	ipany Logo 🎸	City	Durban	
	2	J/S	South Africa	South Africa	
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			Reg No.: 0000000as	a4521 Fax No.: 031 12 4545	
			VAT No.: 0000000	Tel No.: 031 123 4567	
E E E E E E E E E E E E E E E E E E E	unctional L	ocation Infor	mation		
F	unctional	Forest Hills Centre	Physical Address:	Plot 91 Leaf Road	
L .	ocation:			LeafHills	
c	lustomer:	HOP001		Pink Town	
		Hope Works (Pty) Ltd		Durban South	
				1234	
				Customer Location Site Equipment	
P	P1020	Qty	Conjer		
1	458-96523	1	K147 Kyocera Colour Copier		
N	MACH	3	New Machine		
s	P19-123456	3	SP19-12 Colour Copier		
S	P1919	1	SP1919 Sprint Colour MFC		
S	P2020	15	SP2020 Sprint Colour MF Copier		
5	971010	3	Sprinccopier		
	Call Informa	ation			
c	Call Reference:	CN0005291	Error Code:		
c	Call Date:	16/10/2021			
т	echnician:	Theo Peterson	Rectification Code:	FIX	
Page 1 of 15					100% \ominus 🔢 🕀

FUNCTIONS TILES

The Customer Locations screen has its own set of **Functions** tiles that direct you to additional information related to the Customer Location.



The Technical Specifications tile directs you to technical information about the customer location. This information can include; the Number of Floors, the Building Type, Security Access, etc. Refer to Functional Location Technical Specifications



The Additional Data tile directs you to 10 additional fields where further information related to the customer location can be entered. Refer to Functional Locations Additional Data





WO History

The Documents tile directs you to a list of all the digital documents that have been linked to the customer location. Refer to Functional Location Documents

The Work Order History tile directs you to a list of all Work Orders linked to the customer location. From the Work Orders for location screen you can Add, Edit, Delete, Close and Complete a work order. Refer to Functional Location Work Order History



arrantv

The Failure Analysis tile directs you to a list all the failures logged against the customer location. Refer to Functional Location Failure Analysis

The Warranty tile directs you to the Warranty for Functional Location screen. If there is a warranty linked to this customer location, the details will be displayed here. Refer to Functional Location Warranty



The Maintenance Methodology tile directs you to all the Maintenance Methodology tasks linked to the customer location, with the dates of the Last and Next Performance displayed. Refer to Functional Location Maintenance Methodology

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