

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

SERVICE

CALLS - EDIT A CALL

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

You may need to **edit** a call, if the main detail, such as the Call Description, is incorrect. The call needs to be **saved** after editing.

A call can be edited in order to view the selected call details and to log call information, such as, book technician time, log part and service requests, raise invoices, etc.

Ribbon Select Service > Calls



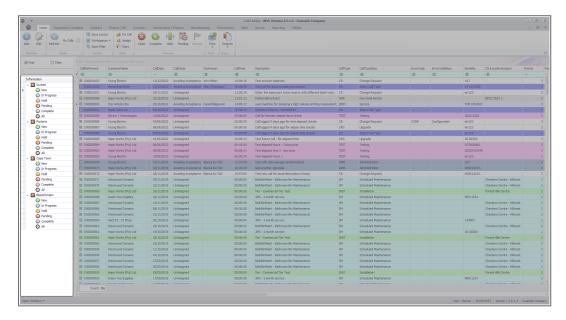
• The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher



| ad Edit Refresh My Calls | 🔏 Save N | ter 🕄 Start | e Complete Hi | | | | | | | | | | | |
|---|---------------------------------------|-----------------------|---------------|---------------------|-----------------|----------|---|-----------|-------------------------|-----------|---------------|-------------|-----------------------------|----------|
| faintain J State | Format | work a | Proc | 255 | a Print a Repo | 4 | | | | | | | | |
| ind Oner | CalReference | CustomerName | CalDate | Calistate | Technician | CalTime | Description | Callype | CallTypeDesc | ErrorCode | ErrorCodeDesc | SeriaNo | CtriLocationSubject | Priprity |
| | + +D: | (D) | | ·0: | 0 | -0: | 0 | ·D: | 0: | 0 | (D) | 0 | (D) | |
| nformation | EE CN0001003 | Young Electric | 13/12/2022 | Awaiting Acceptance | | 10:09:10 | Test account balances | CR | Change Request | - | - | 107 | - | |
| Durban | E CN0001003 | Samanthas Diner | 12/12/2022 | Awaiting Acceptance | | 16:18:30 | Test call for account balances manual. | DR | Select Cal Type | | | 19-12/1202 | | _ |
| New | | | | | Mary Inompson | | | | | | | | | |
| In Progress | E CN0001001 | Young Bectric | 29/11/2022 | | | 11:29:19 | Order the same part twice receive with different batch num | | Change Request | | | sin123 | | |
| Hold | E CN0000996 | Hope Works (Pty) Ltd | 31/10/2022 | | | 11:01:11 | ForRentalContract | NDR | New Deal Rental | | | | BPO2 TEST 1 | |
| Pending | E CN0000992 | Top Vehicle Hire | 25/10/2022 | | Daniel Balgowen | 14:09:17 | Loan machine for temporary high volume printing requirement | | Service | | | TOP 1234OLD | | |
| O Complete | E CN0000991 | Apple Juice Inc | 24/10/2022 | UnAssigned | | 16:38:15 | Contract Closure - CO0000054 | DR | Select Call Type | | | | | |
| O Al | E CN0000989 | Derton / Technologies | 13/06/2022 | UnAssigned | | 09:00:00 | Call for Monday elapse hours check | TEST | Testing | | | 2020-2222 | | |
| D Pretoria | E CN0000988 | Young Electric | 03/06/2022 | UnAssigned | | 05:00:00 | Call logged 5 days ago for time elapsed checks | CR | Change Request | CONF | Configuration | sin123 | | |
| New | E CN0000987 | Young Electric | 06/06/2022 | UnAssigned | | 05:00:00 | Call logged 4 days ago for elapse time checks | UPG | Upgrade | | | sin 123 | | |
| In Progress | CN0000986 | Young Electric | 07/06/2022 | Unitssigned | | 05:00:00 | Call logged 3 days ago for elapse time checks | DR | Select Cal Type | | | sin123 | | |
| Hold | E CN0000985 | Hope Works (Pty) Ltd | 10/06/2022 | UnAssigned | | 16:09:13 | Test future call - for elapsed time | UPG | Upprade | | | 20-98765 | | |
| Pending | E CN0000984 | Hope Works (Ptv) Ltd | 08/06/2022 | UnAssigned | | 05:10:00 | Test elapsed hours - 2 days prior | TEST | Testing | | | AT5000000 | | |
| Complete | E CN0000983 | Hope Works (Pty) Ltd | 09/06/2022 | UnAssigned | | 05:08:31 | Test elepsed time 2 - day prior | TEST | Testing | | | SIN32413546 | | |
| () AI | E CN0000982 | Young Electric | 10/06/2022 | UnAssigned | | 05:00:35 | Test elapsed hours 1 | TEST | Testing | | | sin123 | | |
| Cape Town | | | | | | | | | | | | | | |
| New New York New Y | CN0000976 CN0000976 CN0000976 | Young Electric | 19/11/2019 | Awaiting Acceptance | | 11:24:39 | Test with site manager email entered | ADM | Administration | | | 107 | | |
| In Progress | E CN0000974 | Hope Works (Pty) Ltd | 18/11/2019 | | | 16:30:20 | test another call email | ADM | Administration | | | 095011015 | | |
| 🕓 Hold | E CN0000972 | Hope Works (Pty) Ltd | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit | 15:57:00 | Test new call for email description in body | CR | Change Request | | | 095011015 | | |
| Pending | E CN0000971 | Westwood Dynamic | 29/11/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 514 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| Complete | EE CN0000970 | Westwood Dynamic | 22/11/2019 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| O A1 | E CN0000969 | Hope Works (Pty) Ltd | 16/11/2019 | UnAssigned | | 03:00:00 | Tier - Commercial Tier Test | INST | Installation | | | | Forest Hills Centre | |
| o tioenfontein | E CN0000968 | Green Tea Supplies | 16/11/2019 | UnAssigned | | 03:00:00 | 2MS - 2 month service | \$24 | Scheduled Maintenance | | | NEW 1234 | | |
| New | E CN0000967 | Westwood Dynamic | 15/11/2019 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilmest | |
| In Progress | E 00000966 | Westwood Dynamic | 08/11/2019 | | | 05:00:00 | BathBinNaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| Hold | E CN0000965 | Westwood Dynamic | 01/11/2019 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | 94 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| Pending | E CN0000964 | Hack PC - IT Shop | 26/10/2019 | UnAssigned | | 03:00:00 | 245 - 2 month service | 574 SM | Scheduled Maintenance | | | 147807 | Creater's Centre - Hildrest | |
| Complete | | | | | | | | 514 | | | | 14/60/ | | |
| O AI | E CN0000963 | Westwood Dynamic | 25/10/2019 | UnAssigned | | 08:00:00 | BathSinMaint - Bathroom Bin Maintenance | | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| | E CN0000962 | Hope Works (Pty) Ltd | 19/10/2019 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | 18-30200 | | |
| | E CN0000961 | Hope Works (Pty) Ltd | 18/10/2019 | UnAssigned | | 03:00:00 | Tier - Commercial Tier Test | INST | Installation | | | | Forest Hills Centre | |
| | EE CN0000960 | Westwood Dynamic | 18/10/2019 | | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| | ⊞ CN0000959 | Westwood Dynamic | 11/10/2019 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hillcrest | |
| | E CN0000958 | Westwood Dynamic | 04/10/2019 | UnAssigned | | 08:00:00 | SathBinMaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| | E CN0000957 | Westwood Dynamic | 27/09/2019 | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| | E CN0000956 | Westwood Dynamic | 20/09/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 514 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000955 | Hope Works (Ptv) Ltd | | UnAssigned | | 08:00:00 | Tier - Commercial Tier Test | DOT | Installation | | | | Forest Hills Centre | |
| | E CN0000954 | Green Tea Supplies | 17/09/2019 | | | 08:00:00 | 2MS - 2 month service | SM. | Scheduled Maintenance | | | NFW 1234 | | |
| | | Westward Departs | | United | | 00.00.00 | Teleformetel Sectore Revelopment | - | Colored and Maintenance | | | | Charless Carbo Million | |
| | Count: 3 | | | | | | | | | | | | | |

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.



• Select the **Call** you wish to work with.



| Home Equipment / L Compared and the second | Is 🗌 🕄 Save Lay | | e Complete Ho | 4 🔀 🏲 Ad Pending Release | Print Report | 5 | | | | | | | | |
|---|-----------------|-----------------------|---------------|-----------------------------|-----------------|----------|---|---------|-----------------------|-----------|---------------|-------------|-----------------------------|----------|
| | | | | | | | | | | | | | | |
| Find O Filter | | | | | | | | | | | | | | |
| | CalReference | CustomerName | CalDate | CaliState | Technician | CalTime | Description | CalType | CallTypeDesc | ErrorCode | ErrorCodeDesc | SeriaNo | | Priority |
| information | * 1D: | 4D: | | ×D: | ·D: | *D: | 0 | ×D: | ·0: | -0: | ·D: | ·0: | 1D: | |
| - Durban | EE CN0001003 | Young Electric | | Awaiting Acceptance | | 10:09:10 | Test account balances | CR | Change Request | | | 107 | | |
| New | CN0001002 | Samanthas Diner | | Awaiting Acceptance | Mary Thompson | 16:18:30 | Test call for account balances manual. | DR. | Select Call Type | | | 19-12/1202 | | |
| In Progress | E CN0001001 | Young Bectric | | UnAssigned | | 11:29:19 | Order the same part twice receive with different batch num | | Change Request | | | sin123 | | |
| () Hold | E CN0000995 | Hope Works (Pty) Ltd | 31/10/2022 | UnAssigned | | 11:01:11 | ForRentalContract | NDR | New Deal Rental | | | | BPO2 TEST 1 | |
| O Pending | ► E CN0000992 | Top Vehicle Hire | 25/10/2022 | Awaiting Acceptance | Daniel Balgowen | 14:09:17 | Loan machine for temporary high volume printing requirement | SERV | Service | | | TOP 12340LD | | |
| C Complete | E (N0000991 | Apple Juice Inc | 24/10/2022 | UnAssigned | | 16:38:15 | Contract Closure - C00000054 | DR | Select Call Type | | | | | |
| O Al | E CN0000989 | Derton / Technologies | 13/06/2022 | UnAssigned | | 09:00:00 | Call for Monday elapse hours check | TEST | Testing | | | 2020-2222 | | |
| - O Pretoria | E CN0000988 | Young Electric | 03/06/2022 | UnAssigned | | 05:00:00 | Call logged 5 days ago for time elapsed checks | CR | Change Request | CONF | Configuration | sin123 | | |
| New | E CN0000987 | Young Electric | 06/06/2022 | UnAssigned | | 05:00:00 | Call logged 4 days ago for elapse time checks | UPG | Upgrade | | | sin123 | | |
| In Progress | CN0000986 | Young Electric | 07/06/2022 | UnAssigned | | 05:00:00 | Call logged 3 days ago for elapse time checks | DR | Select Call Type | | | sin 123 | | |
| (b) Hold | E CN0000985 | Hope Works (Pty) Ltd | 10/06/2022 | UnAssigned | | 16:09:13 | Test future call - for elapsed time | LIPG | Upprade | | | 20-98765 | | |
| Pending | E CN0000984 | Hope Works (Pty) Ltd | 08/06/2022 | UnAssigned | | 05:10:00 | Test elapsed hours - 2 days prior | TEST | Testing | | | AT5000000 | | |
| Complete | E (N0000983 | Hope Works (Pty) Ltd | | UnAssigned | | 05:08:31 | Test elapsed time 2 - day prior | TEST | Testing | | | SIN32413546 | | |
| O AI | E CN0000982 | Young Electric | | | | 05:00:35 | Test elapsed hours 1 | TEST | Testing | | | sin123 | | |
| Cape Town | E CN0000975 | | | Awaiting Acceptance | Ramon Do Talk | 11:24:39 | Test with site manager email entered | ADM | Administration | | | 107 | | |
| O New | E CN0000976 | Hope Works (Ptv) Ltd | | | | 16:30:20 | test another call email | ADM | Administration | | | | | |
| In Progress | | | | | | | | | | | | 095011015 | | |
| O Hold | E CN0000972 | Hope Works (Pty) Ltd | | Awaiting Acceptance | Bianca Du Toit | 15:57:00 | Test new call for email description in body | CR | Change Request | | | 099019015 | | |
| Pending Complete | E CN0000971 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| Complete | EE CN0000970 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hillcrest | |
| - O tioemfontein | E CN0000969 | Hope Works (Pty) Ltd | | UnAssigned | | 03:00:00 | Tier - Commercial Tier Test | INST | Installation | | | | Forest Hills Centre | |
| New | E CN0000968 | Green Tea Supplies | | UnAssigned | | 03:00:00 | 2MS - 2 month service | 514 | Scheduled Maintenance | | | NEW 1234 | | |
| In Progress | E CN0000967 | Westwood Dynamic | 15/11/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| () Hold | | Westwood Dynamic | 08/11/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 514 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| Pending | EE CN0000965 | Westwood Dynamic | 01/11/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| Complete | | Hack PC - IT Shop | 26/10/2019 | UnAssigned | | 03:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | 147807 | | |
| O AI | E CN0000963 | Westwood Dynamic | 25/10/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 524 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| | E CN0000962 | Hope Works (Pty) Ltd | 19/10/2019 | UnAssigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | 18-30200 | | |
| | E CN0000961 | Hope Works (Pty) Ltd | 18/10/2019 | UnAssigned | | 03:00:00 | Tier - Commercial Tier Test | INST | Installation | | | | Forest Hills Centre | |
| | EE CN0000960 | Westwood Dynamic | 18/10/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000959 | Westwood Dynamic | 11/10/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000958 | Westwood Dynamic | 04/10/2019 | | | 08:00:00 | BathBinNaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| | E CN0000957 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000956 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000955 | Hope Works (Pty) Ltd | | UnAssigned | | 08-00-00 | Tier - Commercial Tier Test | DIST | Installation | | | | Forest Hills Centre | |
| | E CN0000954 | Green Tea Supplies | | UnAssigned | | 08:00:00 | 245 - 2 month service | 9M | Scheduled Maintenance | | | NEW 1234 | To each ma colligie | |
| | E CN0000954 | oreen rea supplies | | University red | | 00100100 | 2/10 * 2 month set yee | 014 | Scheduled Maintenance | | | menr1234 | | |
| | Count: 38 | ~ | | | | | | | | | | | | |

• Click on the **Edit** button.

| Home Equipment / | | | | | | Call | Listing - BPO: Version 2.5.1.4 - Example Company | | | | | | | |
|--------------------------------------|--------------------|--------------------------------------|-----------------|---------------------|------------------|----------|--|------------|--|-----------|---------------|-------------|-----------------------------|----------|
| Home Equipment / | Locations Contract | Finance / HR Envent | ory Maintenance | / Projects Manufac | turing Procureme | nt Sales | Service Reporting Utilities | | | | | | | |
| Edt Refresh Hy Ca | dis | es = 🚜 Assign 🚺 | se Complete Ho | | Print Report | | | | | | | | | |
| d Onter | | | | | | | | | | | | | | |
| U Unite | CalReference | CustomerName | CalDate | Calistate | Technician | Calling | Description | Callype | CallTypeDesc | ErrorCode | ErrorCodeDesc | SeriaNo | CtrtLocationSubject | Priprity |
| | Y 10: | (D) | | ·D: | ×O: | ·D: | 0: | 4D: | 0: | -0- | *D: | 0: | (D) | |
| mation | E CN0001003 | Young Bectric | | Awaiting Acceptance | Arin Milton | 10:09:10 | Test account balances | CR | Change Request | | | 107 | | |
| Durban | E CN0001002 | Samanthas Diner | 12/12/2022 | Awaiting Acceptance | | 16:18:30 | Test call for account balances manual. | DR | Select Cal Type | | | 19-12/1202 | | |
| O New | E CN0001001 | Young Electric | | UnAssigned | Hary monpoort | 11:29:19 | Order the same part twice receive with different batch num | | Change Request | | | sin123 | | |
| In Progress | | | | | | | | NDR | | | | 80125 | | |
| 🕑 Hold | E CN0000996 | Hope Works (Pty) Ltd | | UnAssigned | | 11:01:11 | ForRentalContract | | New Deal Rental | | | | BPO2 TEST 1 | |
| Pending | ► CN0000992 | Top Vehicle Hire | | Amaiting Acceptance | | 14:09:17 | Loan machine for temporary high volume printing requirement | | Service | | | TOP 12340LD | | |
| Complete | E CN0000991 | Apple Juice Inc | | UnAssigned | | 16:38:15 | Contract Closure - CO0000054 | DR | Select Call Type | | | | | |
| O Al | E CN0000989 | Derton / Technologies | | UnAssigned | | 09:00:00 | Call for Monday elapse hours check | TEST | Testing | | | 2020-2222 | | |
| Pretoria | E CN0000988 | Young Electric | | UnAssigned | | 05:00:00 | Call logged 5 days ago for time elapsed checks | CR | Change Request | CONF | Configuration | sin123 | | |
| O New | E CN0000987 | Young Electric | | UnAssigned | | 05:00:00 | Call logged 4 days ago for elapse time checks | UPG | Upgrade | | | sin 123 | | |
| In Progress Hold | ■ CN0000986 | Young Electric | 07/06/2022 | | | 05:00:00 | Call logged 3 days ago for elapse time checks | DR | Select Call Type | | | sin 123 | | |
| Pending | E CN0000985 | Hope Works (Pty) Ltd | 10/06/2022 | UnAssigned | | 16:09:13 | Test future call - for elapsed time | LIPG | Upgrade | | | 20-98765 | | |
| Complete | E CN0000984 | Hope Works (Pty) Ltd | 08/06/2022 | UnAssigned | | 05:10:00 | Test elapsed hours - 2 days prior | TEST | Testing | | | AT5000000 | | |
| Q Al | E CN0000983 | Hope Works (Pty) Ltd | 09/06/2022 | UnAssigned | | 05:08:31 | Test elapsed time 2 - day prior | TEST | Testing | | | SIN32413546 | | |
| Cape Town | E CN0000982 | Young Electric | 10/06/2022 | UnAssigned | | 05:00:35 | Test elapsed hours 1 | TEST | Testing | | | sin123 | | |
| O New | E CN0000975 | Young Electric | 19/11/2019 | Awaiting Acceptance | Bianca Du Toit | 11:24:39 | Test with site manager email entered | ADM | Administration | | | 107 | | |
| In Progress | E CN0000974 | Hope Works (Pty) Ltd | 18/11/2019 | Amaiting Acceptance | Bianca Du Toit | 16:30:20 | test another call email | ADM | Administration | | | 095011015 | | |
| () Hold | E CN0000972 | Hope Works (Pty) Ltd | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit | 15:57:00 | Test new call for email description in body | CR | Change Request | | | 095011015. | | |
| Pending | E CN0000971 | Westwood Dynamic | 29/11/2019 | UnAssigned | | 03:00:00 | BathSinMaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hilcrest | |
| O Complete | EE CN0000970 | Westwood Dynamic | 22/11/2019 | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| O AI | E CN0000969 | Hope Works (Pty) Ltd | 16/11/2019 | Unitssigned | | 03:00:00 | Tier - Commercial Tier Test | DIST | Installation | | | | Forest Hills Centre | |
| 5 tioemfontein | E CN0000968 | Green Tea Supplies | | UnAssigned | | 08:00:00 | 2MS - 2 month service | 54 | Scheduled Meintenance | | | NEW 1234 | | |
| New | E CN0000967 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| In Progress | E CN0000965 | Westwood Dynamic | | UnAssigned | | 08:00:00 | BathBinNeint - Bathroom Bin Meintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| () Hold | E CN0000965 | Westwood Dynamic Westwood Dynamic | 01/11/2019 | | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| Pending | E CN0000965 | Hack PC - IT Shop | | UnAssigned | | 03:00:00 | BathbriMant - Bathroom Bin Mantenance 2MS - 2 month service | 574 | Scheduled Maintenance Scheduled Maintenance | | | 147807 | constants centre - mildrest | |
| O Complete | E CN0000964 | Westwood Dynamic | | | | 03:00:00 | 2MS - 2 Month service BathBinMaint - Bathroom Bin Maintenance | 514 | Scheduled Maintenance | | | 14/807 | Checkers Centre - Hilcrest | |
| O Al | | | | UnAssigned | | | BathSinMaint - Bathroom Bin Maintenance 2MS - 2 month service | 594 594 | | | | | uneours uentre - Hilcrest | |
| | E CN0000962 | Hope Works (Pty) Ltd | | UnAssigned | | 03:00:00 | | | Scheduled Maintenance | | | 18-30200 | | |
| | E CN0000961 | Hope Works (Pty) Ltd | | UnAssigned | | 03:00:00 | Tier - Commercial Tier Test | INST | Installation | | | | Forest Hills Centre | |
| | EE CN0000960 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | 514 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000959 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000958 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinNaint - Bathroom Bin Maintenance | 54 | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000957 | Westwood Dynamic | | UnAssigned | | 08:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hillcrest | |
| | E CN0000936 | Westwood Dynamic | | UnAssigned | | 03:00:00 | BathBinMaint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hildrest | |
| | E CN0000955 | Hope Works (Pty) Ltd | 18/09/2019 | UnAssigned | | 03:00:00 | Tier - Commercial Tier Test | DIST | Installation | | | | Forest Hills Centre | |
| | E CN0000954 | Green Tea Supplies | 17/09/2019 | UnAssigned | | 03:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW 1234 | | |
| | m europeaners | | | | | | Red.Restaura Red | - | | | | | Martine Parties Alberta | |
| | Count: 386 | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

• The **Call maintenance: Call ref. -** [call ref number] screen will be displayed.



Calls - Edit a Call

| | | | | | Call maintenand | ce : Call ref (| CN0001006 - | BPO: Version 2.5.1.4 - Example Company | | | | | - 8 |
|---|---|--|-----------|------------|--|--|---|--|---|---|-------------|---------------|--|
| Home Equipment | nt / Locations Cor | tract Finance / HR | Inventory | Mainten | ance / Projects M | lanufacturing | Procuremen | t Sales Service Reporting Utilities | | | | | - 8 |
| H Co Cose Con | 💽 🎿 り | 4 🔯 📂 | Reinstate | Save Layou | | Print Note | | | | | | | |
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| laintain 🗳 | Pro | ess | 4 | Fo | rmat 🔺 Pr | rint 🖌 Info | 4 | | | | | | |
| s ä | | | | | Relates To : | | _ | | | | | | |
| r text to search P | Customer | Hope Works (Pty) Ltd | م | + * | ReferenceType Serial No | | eferenceNo N32413546 | | | | | | |
| nctions | Contact | Tim Matthews | Q | ··· * | Senai No Prior Call Reference | | N32413546 | | | | | | |
| incoorts | Contact No. | 089 123 4567 | | | Cal Request Ref | | | | | | | | |
| Work Orders 2 | Address | | ρ | | Contract No | | 00000049 | | | | | | |
| | Address | | <i>p</i> | | Location | | | | | | | | |
| | | | | | Project Reference | | | | | | | | |
| | | | | | Quote Reference | | | | | | | | |
| Vork In Progress | Call Type | Parts Requirement | | • • | Invoice Reference | | | | | | | | |
| | Error Code | Faulty | | • | Order Reference | | | | | | | | |
| | Description | Machine repair require | d | | | | | | | | | | |
| lotes | Description | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | Call Date Time | | | | | | | | | | | | |
| and an an an in | | 07/06/2023 • | 11:21:29 | \$ | | | | | | | | | |
| Assignments | | 07/06/2023 ¥ | 11:21:29 | Ŧ | Prior Calls : | | | | | | | | |
| lssignments | Priority | | 11:21:29 | • | Prior Calls : CalReference | CalDate | CallTime | Description | CalType | CallTypeDesc Er | irrorCode E | ErrorCodeDesc | Seria |
| | Priority | 3 ‡ * | 11:21:29 | • | | CalDate 07/06/2023 | | Description Machine repair required | CallType PR | CallTypeDesc Er Parts Requirement F/ | | ErrorCodeDesc | |
| | Priority | 3 ‡ * | 11:21:29 | • | CalReference CN0001006 CN0000983 | 07/06/2023 | 11:21:29 06:08:31 | Machine repair required Test elapsed time 2 - day prior | PR DR | Parts Requirement FA Select Call Type | | | SIN3 SIN3 |
| | Priority | 3 🗘 * 07/06/2023 👻 | 11:21:29 | • | CalReference CN0001006 CN0000983 CN0000981 | 07/06/2023 09/06/2022 11/12/2019 | 11:21:29 06:08:31 09:55:00 | Machine repair required Test elapsed time 2 - day prior test placing call on hold | PR DR ADM | Parts Requirement FA Select Call Type Administration | | | SIN3 SIN3 SIN3 |
| | Priority SLA Date Required Order No | 3 ¢ * | 11:21:29 | | CalReference CN0001006 CN0000983 CN0000981 CN0000978 | 07/06/2023 09/06/2022 11/12/2019 21/11/2019 | 11:21:29 06:08:31 09:55:00 11:07:42 | Machine repair required Test elapsed time 2 - day prior test placing call on hold Driver Connect - full set of toners required | PR DR ADM PR | Parts Requirement F/ Select Call Type Administration Parts Requirement | | | SIN3 SIN3 SIN3 SIN3 |
| fold History | Priority SLA Date Required Order No Logged By | 3 🔹 • 07/06/2023 • Bianca | 11:21:29 | | CalReference CN0001006 CN0000983 CN0000981 CN0000978 CN0000980 | 07/06/2023 09/06/2022 11/12/2019 21/11/2019 21/11/2019 | 11:21:29 06:08:31 09:55:00 11:07:42 12:16:47 | Machine repair required Test eliopied time 2 - day prior test placing call on hold Driver Connect - full set of toners required Driver Connect - offline test | PR DR ADM PR TON | Parts Requirement F/ Select Call Type Administration Parts Requirement Toner Required | | | SDN3 SDN3 SDN3 SDN3 SDN3 SDN3 |
| fold History | Priority SLA Date Required Order No Logged By | 3 ¢ * | 11:21:29 | | CalReference CN0001006 CN0000983 CN0000981 CN0000978 | 07/06/2023 09/06/2022 11/12/2019 21/11/2019 | 11:21:29 06:08:31 09:55:00 11:07:42 12:16:47 15:05:26 | Machine repair required Test delogacia din hold Driver Connect - full set of tomers required Driver Connect - offline test It seems like cal notes are not saving for call request | PR DR ADM PR | Parts Requirement F/ Select Call Type Administration Parts Requirement | | | SIN3 SIN3 SIN3 SIN3 |
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CALL DETAILS

• Update the Call Details as required. Note that when **Editing** only certain fields can be updated.

| Home Equipment | | | | Call maintenano | e : Call ref Cl | N0001006 - I | 3PO: Version 2.5.1.4 - Example Company | | | | | - 8 |
|---|---|-------------------------|-----------------|--|--|--|---|--|--|-----------|-------------------------|--|
| | nt / Locations Contr | act Finance / HR | Inventory M | Maintenance / Projects Ma | anufacturing | Procurement | : Sales Service Reporting Utilities | | | | | - 8 |
| | | Pending Release | | - | int Note | | | | | | | |
| | | | | | | | | | | | | |
| inks # | · · · | | | Relates To : | | | | | | | | |
| iter text to search P | Customer | Hope Works (Pty) Ltd | • ۹ | ReferenceType | | ferenceNo | | | | | | |
| | Contact | Tim Matthews | • م | Serial No | | 132413546 | | | | | | |
| unctions | Contact No. | | | Prior Call Referen | | | | | | | | |
| | | 069 123 4367 | | Call Request Refe Contract No | | 0000049 | | | | | | |
| | Address | | <u>, макала</u> | Location | 00 | 0000049 | | | | | | |
| | | | | Project Reference | | | | | | | | |
| | | | | Ouote Reference | | | | | | | | |
| Work In Progress | Call Type | Parts Requirement | • • | Invoice Reference | | | | | | | | |
| | | | | Order Reference | | | | | | | | |
| | Error Code | Faulty | - | | | | | | | | | |
| | Description | Machine repair required | × * | | | | | | | | | |
| | | | | | | | | | | | | |
| Assignments | Call Date Time Priority | | 11:21:29 | Prior Calls : | | | | | | | | |
| Assignments | | | 11:21:29 | CalReference | CalDate | CallTime | Description | | CallTypeDesc | ErrorCode | ErrorCodeDesc | |
| | Priority SLA | 3 🔹 * | 11:21:29 | CalReference CN0001006 | 07/06/2023 | 11:21:29 | Machine repair required | PR | Parts Requirement | | ErrorCodeDesc Faulty | SIN3 |
| Assignments Hold History | Priority | 3 🔹 * | 11:21:29 | CalReference CN0001006 CN0000983 | 07/06/2023 | 11:21:29 06:08:31 | Machine repair required Test elapsed time 2 - day prior | PR DR | Parts Requirement Select Call Type | | | SIN3 SIN3 |
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| Hold History Pending History | Priority SLA Date Required Order No Logged By Status | 3 🛟 * 07/06/2023 👻 | 11:21:29 | CallReference CN0001006 CN000983 CN000983 CN000980 CN000980 CN0000819 CN0000819 CN0000816 CN00009797 CN0000791 | 07/06/2023 09/06/2022 11/12/2019 21/11/2019 21/11/2019 15/10/2019 17/05/2019 14/05/2019 10/01/2019 18/09/2018 06/09/2018 | 11:21:29 06:08:31 09:55:00 11:07:42 12:16:47 15:05:26 13:38:48 13:51:04 13:44:52 16:28:30 16:44:03 13:29:02 13:23:17 | Nachine repair required Test elegade the 2- day prior test placed the 2- day prior test placed and the day that the sequence the second second second second second second test and second second second second second test and second second second second second test and for back order report Vision dan's to test requery tarvhase offers Test and for sub invoice processing Test and for sub invoice processing Test and for sub invoice processing Test song second second second second test song second te | PR DR ADM PR TON DR DR DR DR DR INSP INSP INST | Parts Requirement Select Call Type Administration Parts Requirement Toner Required Select Call Type Select Call Type Administration Select Call Type Installation Inspection | FA | | SIN3 SIN3 |
| Hold History Pending History On Site Info 1 | Priority SLA Date Required Order No Logged By Status | 3 🛟 * 07/06/2023 👻 | 11:21:29 | CallReference CN0001006 CN0000813 CN000081 CN000081 CN000082 CN000082 CN0000819 CN0000819 CN0000819 CN0000819 CN0000819 CN0000815 CN0000797 CN0000791 CN0000791 CN0000793 CN000793 CN000793 CN0000793 CN0000793 CN00000032 CN0000083 CN000083 CN0000083 CN00083 CN000083 CN00083 CN000083 CN000083 CN000083 CN000083 CN000083 CN000083 CN000083 CN000083 CN0000797 CN000793 CN000751 CN000751 CN000753 CN000056 CN000056 CN000056 CN000056 CN000056 CN0056 CN00 | 07/06/2023 09/06/2022 11/12/2019 21/11/2019 21/11/2019 15/10/2019 15/10/2019 10/01/2019 18/09/2018 06/09/2018 06/07/2018 | 11:21:29 06:08:31 09:55:00 11:07:42 12:16:47 15:05:26 13:38:48 13:51:04 13:44:52 16:28:30 16:44:03 13:29:02 13:23:17 11:49:10 | Nachine repair required Test elevent die 2, - dary pror test plangt og all in hold Driver Connet diffee test takens like call norse annot saving for call request Test auto scheduling is like Constet auf fin winning and atterpt to noest ageinst a dosed Constet auf fin winning and atterpt to noest ageinst a dosed Test auf fin black order report Work onder he test regioning purchase orders Test auf fin black order prost | PR DR ADM PR TON DR DR DR DR INST INSP INSP INST IT | Parts Requirement Select Call Type Administration Parts Requirement Toner Required Select Call Type Select Call Type Installation Inspection Inspection Inspecton | FA | | 51N3 50N3 50N3 50N3 50N3 50N3 50N3 50N3 50 |



CALL METER READING

• If the asset has meters linked, then the Meters frame will automatically expand to display the Meter reading data grid.

| ÷ چ | | | | | | | Call | maintenance | - BPO: Versi | on 2.5.1.4 - Exampl | le Company | | | | | | -) & X |
|------------------|--------------|----------------|---------------|----------------|-----------|-------------|-------------------------------|---------------|--------------------------|----------------------------|---------------------------------------|----------------|--------|---------------------------|------------|---------------------|---------------|
| Ho | me Equipme | nt / Locations | Contract F | inance / HR | Inventory | Maintenan | ce / Projects M | lanufacturing | Procuremen | nt Sales Ser | vice Reporting U | thities | | | | | _ & × |
| Save Back | | nplete Assign | | · · | Reinstate | Save Layout | Workspaces F | rint Note | | | | | | | | | |
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| Links | 4 | Custor | ner Hope Wor | ke (Dtv) I M | م | | Relates To : | | leferenceNo | | | | | | | | |
| Enter text to se | arch P | | | | | | Serial No | | IN32413546 | | | | | | | | |
| Functions | | | act Tim Matt | | ر ر | | Prior Call Referen | nce | | | | | | | | | |
| | | Contact | No. 089 123 4 | | | | Call Request Ref | erence | | | | | | | | | |
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| Work In Pro | ogress | Call T | pe Parts Rec | uirement | | • • | Invoice Reference | | | | | | | | | | |
| | | Error C | de Faulty | | | - 1 | Order Reference | | | | | | | | | | |
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| Notes | | Descript | ion Machine r | epair required | | ^ * | | | | | | | | | | | |
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| Assignment | * | | | | 1:21:29 | - | | | | | | | | | | | |
| | | Prio | rity 3 🗘 🕯 | | | C. | Prior Calls : | | | | | | | | | | |
| | | 9 | 5LA 0.00 | | | | CalReference | CalDate | CallTime | Description | | | alType | CallTypeDesc | ErrorCode | ErrorCodeDesc | SerialNo |
| Hold History | | Date Requi | red 07/06/20 | 23 - | | | CN0000983 CN0000981 | | 2 05:08:31 | Test elapsed time | | TE | | Testing Administration | | | SIN3 A |
| nourisur | ′ II | | | | | | CN0000981 CN0000978 | | 9 09:55:00 9 11:07:42 | test placing call o | n noid full set of toners required | | | Parts Requirement | | | SIN3 SIN3 |
| | | Order | No | | | | CN0000980 | | 9 12:16:47 | Driver Connect - | | TC | | Toner Required | | | SIN3 |
| | | Logged | By Bianca | | | | | | 9 15:05:26 | it seems like call n | otes are not savino for ca | all request BL | | Software Bug | | | SIN3 |
| Meters | | | | | | | | | | | | | | | | | * |
| Meters | | | | | | | | | | | | | | | | | |
| SerialNo | MeterDefCode | Description | ReadingDate | ReadingTime | Period | MeterReadin | g PriorReading | Comments | | | | | | | | | |
| ► SIN3241354 | | | | | | _ | _ | - | | | - | | | | | | |
| ► SIN3241354 | 6 Mono | Mono meter | 07/06/2023 | 11:22:41 | | • | 0.00 100.0 | | | | | | | | | | |
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| Meters | | | | | | | | | | | | | | | | | |
| Open Windows | Ŧ | | | | | | | | | | | | | User : Bianca 0 | /06/2023 V | ersion : 2.5.1.4 Ex | ample Company |
| | | | | | | | | | | | | | | | | | |

- Type in the meter reading(s), if required.
 - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that are yield controlled.
 - If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.
- You can also add a comment for each meter reading.
- When the meter reading has been updated, **hide** the frame by clicking outside the frame.



| ¢ ب | | | | | | | Call | naintenance | - BPO: Versio | a 2.5.1.4 - Example Company | | | | | - 8 x |
|----------------|--------------|--------------|---------------|----------------|-----------|-----------|--------------------------------------|--------------|--------------------------|---|-----------|-------------------------------------|-------------|----------------------|----------------|
| Hon | ne Equipment | /Locations | Contract F | Finance / HR | Inventory | Maintena | nce / Projects M | anufacturing | Procuremen | Sales Service Reporting Utilities | | | | | _ & × |
| Save Back | | kete Assign | | | | | Workspaces P | rint Note | | | | | | | |
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| | # | Custon | Hope Wo | rke (Phy) I M | م | | ReferenceType | D | eferenceNo | | | | | | |
| | rch 🔎 | | | | , . | | Serial No | | N32413546 | | | | | | |
| Functions | | | act Tim Matt | | , Q | | Prior Call Referen | ice | | | | | | | |
| | | Contact | No. 089 123 · | | | | Call Request Refi | erence | | | | | | | |
| Work Orders | | Addr | 155 | | ρ | | Contract No | | | | | | | | |
| | | | | | | | Location | | | | | | | | |
| | | | | | | | Project Reference Ouote Reference | | | | | | | | |
| Work In Pro | ~~~ | Call Ty | pe Parts Res | wirement | | | Invoice Reference | | | | | | | | 100 |
| Hore arrive | y | | | | | | Order Reference | | | | | | | | |
| | | Error Co | de Faulty | | | • | | | | | | | | | 80 |
| Notes | | Descript | ion Machine r | epair required | | • • | | | | | | | | | 6 |
| Assignments | | | | 23 * 1 | 11:21:29 | * | | | | | | | | | Local Decision |
| | | Prior | ity 3 🗘 ' | | | | Prior Calls : | | | | | | | | |
| | | 5 | LA 0.00 | | | | CalReference | CalDate | CallTime | Description | CalType | CallTypeDesc | ErrorCode | ErrorCodeDesc | SerialNo |
| Hold History | | Data Requir | ed 07/06/20 | 23 - | | | CN0000983 | | 2 06:08:31 | Test elapsed time 2 - day prior | TEST | Testing | | | SIN3 + |
| Hold History | | | | | | | CN0000981 | | 09:55:00 | test placing call on hold Driver Connect - full set of toners required | ADM | Administration | | | SIN3 SIN3 |
| | | Order | No | | | | CN0000978 CN0000980 | | 9 11:07:42 9 12:16:47 | Driver Connect - full set of toners required Driver Connect - offline test | PR TON | Parts Requirement Toner Required | | | SIN3 |
| | | Logged | By Bianca | | | | CN0000832 | | 15:05:26 | it seems like call notes are not saving for call request | BUG | Software Bug | | | SIN3 |
| Meters | | | | | | | | | 20.00.20 | | | | | | - |
| Meters | | | | | | | | | | | | | | | |
| SerialNo | MeterDefCode | | ReadingDate | ReadingTime | e Period | MeterRead | ing PriorReading | Comments | | | | | | | |
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| I SIN32413546 | i Mono | Mono meter | 07/06/2023 | 11:22:41 | | 4 1! | 50.00 100.0 | Reading pro | vided by Tim w | en call was logged | | | | | |
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| Meters | | | | | | | | | | | | | | | |
| Open Windows * | | | | | | | | | | | | User : Bianca 0 | 7/06/2023 W | ersion : 2.5.1.4 Exa | mple Company |

• When you are done, click on **Save**.

| Home Equipm | | art Ensare / HD | | | | | n 2.5.1.4 - Example Company t Sales Service Reporting Utilities | | | | | - 8 |
|---|---|---|----------------------|--|--|--|---|---|--|-----------|---------------|--|
| Tione Equipin | | deale les | | | | | a arres are nice ricepon ung ourses | | | | | |
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| Back Close C | | Pending Release | Reinstate Save I | avout Workspaces F | rint Note | | | | | | | |
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| ; 4 | | | | Relates To : | | | | | | | | |
| text to search P | Customer | lope Works (Pty) Ltd | * + ··· م | ReferenceType | Re | ferenceNo | | | | | | |
| | Contact | Tim Matthews | e | Serial No | | 132413546 | | | | | | |
| nctions | | | | Prior Call Referen | | | | | | | | |
| | Contact No. | | | Call Request Ref | erence | | | | | | | |
| | Address | | <u>ب</u> م | Contract No Location | | | | | | | | |
| | | | | Project Reference | | | | | | | | |
| | | | | Ouote Reference | | | | | | | | |
| /ork In Progress | Call Type | Parts Requirement | * * | Invoice Reference | | | | | | | | |
| | Constants [| T 14 | | Order Reference | | | | | | | | |
| | Error Code | | * | | | | | | | | | |
| | Description | Machine repair required | ~ * | | | | | | | | | |
| lotes | | | | | | | | | | | | |
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| | Call Date Time | 07/06/2023 👻 1 | 1:21:29 | | | | | | | | | |
| ssignments | | | 1:21:29 | | | | | | | | | |
| ssignments | Call Date Time | | 1:21:29 | Prior Calls : | | | | | | | | |
| ssignments | | 3 🔹 * | 1:21:29 | CalReference | CalDate | CallTime | Description | CallType | CalTypeDesc | ErrorCode | ErrorCodeDesc | |
| | Priority | 3 * * | 1:21:29 | CalReference CN0000983 | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior | TEST | Testing | ErrorCode | ErrorCodeDesc | SIN |
| | Priority SLA Date Required | 3 * * | 1:21:29 | CalReference CN0000983 CN0000981 | 09/06/2022 | 05:08:31 09:55:00 | Test elapsed time 2 - day prior test placing call on hold | TEST ADM | Testing Administration | | ErrorCodeDesc | SUN SUN |
| | Priority | 3 * * | 1:21:29 | CalReference CN0000983 CN0000981 CN0000978 | 09/06/2022 11/12/2019 21/11/2019 | 06:08:31 09:55:00 11:07:42 | Test elapsed time 2 - day prior test placing call on hold Driver Connect - full set of toners required | TEST ADM PR | Testing Administration Parts Requirement | | ErrorCodeDesc | SIN SIN SIN |
| | Priority SLA Date Required | 3 * 0.00 07/06/2023 * | 1:21:29 | CalReference CN0000983 CN0000981 | 09/06/2022 11/12/2019 21/11/2019 21/11/2019 | 06:08:31 09:55:00 11:07:42 12:16:47 | Test elapsed time 2 - day prior test placing call on hold Driver Connect - full set of toners required Driver Connect - offline test | TEST ADM PR TON | Testing Administration Parts Requirement Toner Required | | ErrorCodeDesc | SIN SIN SIN SIN |
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| | Priority SLA Date Required Order No | 3 • • 0.00 07/06/2023 • Blanca | 1:21:29 | CalReference CN0000983 CN0000981 CN0000978 CN0000980 CN0000980 | 09/06/2022 11/12/2019 21/11/2019 21/11/2019 15/10/2019 | 06:08:31 09:55:00 11:07:42 12:16:47 15:05:26 13:38:48 | Test elapsed time 2 - day prior test placing call on hold Driver Connect - full set of toners required Driver Connect - offline test it seems like call notes are not saving for call request | TEST ADM PR TON BUG | Testing Administration Parts Requirement Toner Required Software Bug | | ErrorCodeDesc | SIN: SIN: SIN: SIN: SIN: SIN: SIN: |
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Related References

- Introduction to Work Orders
- Add a Call
- Calls Edit Buttons

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