

SERVICE

CALLS - ADD TRAVEL

If you want to keep track of travel done by a technician, you can log this on the call.

The travel logged on a call will not be billed.

The system previously used the **Billable** flag in order to invoice travel, however, travel is now billed via **Travel Radii** or **Travel Zones** - which will check the contract / asset configuration to see whether travel should be billed or not.

Travel can also be added to an invoice separately. **Travel Radii** must be set up correctly.

If you cannot link travel to the call due to the message: 'No items to select from', then an Expense Allocation, Expense Type, and Travel Rate must be configured.

Ribbon Access: Service > Calls



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

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- Select the **site** and **status**.
 - In this image, **Durban** has been selected as the site and the status has been set to **New**.

	۲			c	Call Listing - 8PO: Version 2.1.0.43 - Example Company — 🛛 🛛 🕹									
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- Click on the row selector in front of the call you wish to log travel to.
- Click on Edit.

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				E CN0000480	29 May 2017	13:21:39	Test call with a location,	TEST	Testing	New	Awaiting Acceptance	Susan D			
				E) CN0000479	26 May 2017	15:03:59	Test saving a call inked t	PR	Parts Requirem	New	UnAssigned		14-9		
				B CN0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F	PR	Parts Requirem	New	UnAssigned		2020		
				E CN0000475	25 May 2017	09:16:05	Swap out - asset on a sh	OR	Select Cal Type	New	UnAssigned		bests		
				CN0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-3		
				CIV0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	u	IT Requirement	Nev	UnAssigned		1020		
				CIV0000472	24 May 2017	14:38:10	Contract Service Test v2	SERV	Service	New	UnAssigned		2020		
				CN0000467	24 May 2017	09:29:20	Call - Loan Unit Request	REP	Repair	New	UnAssigned		20-8		
				CN0000464	23 May 2017.	08:54:25	Loan Unit Return v2.1	REP	Repair	New	UnAssigned		20-8		



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

• Click on the Work Orders tile.

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The Work Orders for Call Ref [] screen will be displayed.



- Click on the **row selector** in front of the **work order** where you wish to **add travel** time.
- Click on the **Travel** tile.





The Travel Claims for WO Code [] screen will be displayed.

• Click on Add.

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The Travel Entry screen will be displayed.

- Work Order: This will auto populate according to the work order initially selected.
- **Employee:** This will auto populate with the name of the person currently logged on to the system but you can click on the drop-down arrow and select an alternative employee from the menu as required.
- **Travel Date:** This will default to the current date. Click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Type:** Click on the drop-down arrow and select the travel rate type e.g. Normal Travel Rate.
- **Detailed Description:** Type in a description / reason for the travel.
- **Destination:** Type in the area travelled to.
- **Distance:** Type in or use the arrow indicators to select the total amount of travel in km.
 - Note: Travel will not be billed from here, but by using Travel Radii instead.



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• When you have finished editing the **Travel Entry** screen, click on **Save**.



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- You will return to the Travel Claims for WO Code [] screen.
- A Travel Processing message box will pop up informing you that;



• Travel Claim on WO: [] complete.

• Click on OK.





• You can now view the newly added travel claim in this screen.

	¥				Trav	vel Claims for V	VO Code W00001480 -	BPO: Version 2.1.0.43 - Exan	ple Company			2			X
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