

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

SERVICE

CALLS - SALES ORDER

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.

After a quote for additional work on a call has been **approved** by the client - this quote will need to be converted to a **Sales Order** to start the procurement process for the parts or services.

Ribbon Select Service > Calls



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

¹BPO2 v2.5.1.3 or higher



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In Progress Hold Hold Hold Genplete Al Complete Al Cope Town O New O In Progress D	CN0000985 11	oung Bectric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
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In Progress	E CN0000976 11	oung Electric	19/11/2019	Awaiting Acceptance	Blanca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
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Pending E	E CN0000971 W	/estwood Dynamic	29/11/2019	UnAssigned		03:00:00	SathSinMaint - Bathroom Sin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete E	E CN0000970 W	/estwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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E	E CN0000955 H	ope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
E	E CN0000954 G	reen Tea Supplies	17/09/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		
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	Count: 386													

- 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.



							Contrast Description 1988/200							
Home Equipment / I	Locations Contract	Hinance / HR Univent	tory Maintenance	/ Projects Manuta	cturing Procureme	nt sales	service Reporting Utilities							
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Durhan	E CN0001003	Young Bectric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
O New	CN0001002	Samanthas Diner	12/12/2022	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	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	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	-
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		
Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Cal Type					
O AI	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Bectric	03/06/2022	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	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 Cal Type			sin123		
O Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
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O 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 Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
O New		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	Awaiting 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	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	t
 Complete 	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	t I
O Al	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
tioemfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	524	Scheduled Maintenance			NEW 1234		
O New	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	ŧ.
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O AL	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	£.
-	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
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	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	i i
	E CN0000936	Westwood Dynamic	20/09/2019	Unissigned		03:00:00	RathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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• Click on the **Edit** button.

						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
Home Equipment / Los	cations Contract	Finance / HR Invento	xy Maintenance	/ Projects Manufa	turing Procureme	nt Sales	Service Reporting Utilities							
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tion	FE CN0001003	Young Electric		Awaiting Acceptance	Arin Milton	10-09-10	Test account balances	CR	Change Request			107		
lurban	E CN0001002	Camanithan Dinar	12/12/2022	Awaiting Acceptance	Mary Thompson	16:10:20	Tast call for account balances may call	DP.	Select Cal Turne			19-12/1202		
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loss frotein	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	Unitosigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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	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	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
		Westwood Dynamic	20/09/2019	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	INST	Installation				Forest Hills Centre	
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- The **Call maintenance : Call ref. -** [call ref number] screen will be displayed.
- Click on the **Orders** tile.



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SALES ORDER LISTING

- The Sales Quotes for Call [call ref number] screen will be displayed.
- Any orders that have already been added for the call, will be listed on this screen.



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ADD SALES ORDER

• Click on Add.

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



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- "The Add new Customer Order screen will be displayed." on page 2
- Complete the Sales Order Header and the Financial Header Information.
- Confirm the **Billing and Shipping Addresses** for the customer, if these fields were not auto populated when you entered the order header information.



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RELATED REFERENCES

• Click on the **Related References** tab to link the reference information for the customer Order.

LINE ITEMS AND COMMENTS

- "Add Sales Order Items" on page 11 as required.
- Click in the **Comments text box** to type a comment related to the Order.
- Click on **Save**to save the customer Order.



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• The **Sales Orders for Customer** listing screen will be updated with the new Order that you have created.

For a detailed handling of this topic refer to Orders - Add Sales Order

EDIT SALES ORDER

Sales Orders that have already been invoiced will **not** be available for editing.

- From the Sales Orders for Call [call ref number] screen,
- Click in the **row** of the Sales Order you wish to edit.
- Click on Edit.

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



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- The Edit Customer Order [Order Number] listing screen will display.
- Make the required changes to the **Heading Information**,
 - Addresses or Related References tabs.
- Make the necessary changes to the Order Item frame:
 - To "Add Sales Order Items" on page 11, click in the Item Type column of the next available row.
 - To "Delete Item line entry" on page 6, click on the row of the item you wish to remove, then click on Delete Item.
- Click on **Save** to save the changes to the Customer Order and return to the **Sales Orders for Customer** screen.

For a detailed handling of this topic refer to Orders - Edit Sales Order



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DELETE SALES ORDER

Orders that have already been invoiced will **not** be available for deletion.

- From the Sales Orders for Call [call ref number] screen,
- Click on to the row of the Sales Order you wish to remove.
- Click on Delete.

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

- The Confirm delete Order message will display;
 - Are you sure you want to delete this Order?
- Click on Yes.



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		C	9 Are yo	Drder 🔶	Yes	ete this Order?	×					

The Sales Order will be **removed** from the **Sales Orders for Customer** listing screen.

For a detailed handling of this topic refer to Orders - Delete Sales Order

VIEW SALES ORDER

An Order can be **viewed** in **any** status.

- From the Sales Orders for Call [call ref number] screen,
- Click on the row of the Sales Order that you wish to view.
- Click on View.

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



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• The View Customer Order - [Order Number] screen will display.

No changes can be made to the information on the Order as this is a **view only** screen.

- You can "Print Sales Order / Print Proforma Invoice" on page 24 from this screen.
- Click Backto return to the Sales Orders for Work Order screen.



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NAVIGATION BUTTONS

- The **Forward** navigation button allows for quick navigation to related documentation, by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The **Back** navigation button will transport you back to the **Work Order Listing** screen.



Hore Experiment // Locations Contract Prance / HR Inventory Maintenance / Projects Maintenance / Proj	-	Ŧ							Sal	les Order	s for Call CNG	005305 - 1	BPO: Version	2.5.0.8 - Exam	ple Company v	v2.5.0.8				_ [D] X
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CREATE INVOICE

- From the Sales Orders for Call [call ref number] screen,
- Select the **row** of the Sales Order you wish to **create an invoice** for.
- Click on **Create Invoice**.

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



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? You will receive three (**3**) **Invoice Generation** messages:

- The first Invoice Generation message will confirm;
 - Do you want to convert order no. [order number], for customer, [customer code], to an invoice?
- Click on Yes.



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- The second **Invoice Generation** message will confirm;
 - Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.
- Click on Yes.



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- When you receive the third **Invoice Generation** message to confirm;
 - Do you wish to view the Invoice created, no [invoice number]?
- Click on **Yes**to view the Invoice.
 - Click on No to return to the Sales Orders for Customer screen.



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- The **Edit Customer Invoice** screen will display where you can view or make changes to the Invoice, if required.
- After making the necessary changes, click on **Save**.

For a detailed handling of this topic refer to Orders - Convert to Sales Invoice



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CREATE NEW DEAL

- From the Sales Orders for Call [call ref number] screen,
- Select the **row** of the Sales Order you wish to create a New Deal for.
- Click on Create New Deal.

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



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- "The New Deal screen will be displayed." on page 3
- Complete the New Deal information as required.
- The Call Type field enables you to distinguish if this order is a <u>New Deal Sale</u> or <u>New Deal Rental</u>.
- When you have completed the new deal information, click on **OK**.
- When you receive the **New Deal** message to confirm that;
 - The new deal call has been created, reference no.

[reference number]

• Click on OK.



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Call Date & Time	17/05/2022 • 15:40:14	\$										
Scheduled Start	17/05/2022 -											
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Assigned to	Wesley Haynes	•	0	The new deal call has b	een created, refere	nce no. CN00053	106.					
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• You will return to the Sales Orders screen.

For a detailed handling of this topic refer to Orders - Convert to New Deal Sale / Rental

ADD ITEMS TO WORK ORDER

The Add Items to WO function is only valid where the Customer Order has been linked to an existing Work Order.

- From the Sales Orders for Call [call ref number] screen,
- Select the **row** of the Sales Order you wish to add items to.
- Click on Add Items to WO.

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



- When you receive the **Add Items to WO** message to confirm;
 - Are you sure you wish to add these order items to
 - associated work order no [work order number]?
- Click on Yes.

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- You will return to the Sales Orders for Work Order screen.
- The Work Order items will have been added to the Sales Order.

For a detailed handling of this topic refer to Orders - Add Items to Work Order

NEW DEAL PROJECT

The New Deal Project sales process will create a Project
 for work to be done and invoiced upon completion

Help v2024.5.0.7/1.0 - Pg 22 - Printed: 21/08/2024



- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing screen.
- From the Sales Orders for Customer [Customer Code] screen,
- Click on the row of the Sales Order you wish to convert to a New Deal Project.
- Click on New Deal Project.

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

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- "The New Deal Project screen will be displayed." on page 3
- Complete the New Deal Project Details as required,
- Click on **OK** to save the new deal details.
- When you receive the **New Deal** message to confirm;

• The new deal project has been created, reference

no. [reference number]

• Click on **OK**.

ф т	4-	New	Deal Project - BPO: Version	2.5.0.8 - Example Comp	any v2.5.0.8				_ - x
Home Equi	ipment / Locations Contract	Finance / HR	Inventory Maintenance /	Projects Manufacturing	Procurement	Sales Service	Reporting	Utilities	_ & ×
Ok Back Process a 6									\$
Client Contact	Tarryn Snow CUSTOMER CONTAC	т •							
Contact Type	Project Manager	•							
Rental Deal									
Work Order Type	Implementation	• *							
Description	SO0006	*							
Scheduled Start	17/05/2022 🔻								
Scheduled End	24/05/2022 -		New Deal	7		×	1		
New Deals Location	Hillcrest	* م							
Assigned to	Steven Cooper	*	1 The new	deal project has been crea	ited, reference no	. PRJ0000422.			
				8		ОК			
Open Windows 👻					User : JulandaK	: 17/05/2022 Ve	rsion : 2.5.0.8	Example Co	mpany v2.5.0.8

• You will return to the Sales Order screen.

For a detailed handling of this topic refer to Orders - Convert to New Deal Project

PRINT SALES ORDER / PRINT PROFORMA INVOICE

You will be able to **Print a Sales Order** and / or **Print a Proforma Invoice** from the;



- Sales Orders screen
- Add New Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

For this example, the proforma invoice will be printed from the **View Customer Order -** [*Order Number*] screen. The same procedure can be followed from any of the above mentioned screens.

- From the View Customer Order [Order Number] screen,
- Click the print option that you require.



Print Proforma Invoice

• The example has **Print Sales Order** selected.

F 1 View Customer Order - OR0000342 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8												-		x				
	Home	Equipment /	Locations	Contract Finan	e / HR Inventory	Maintenance / Proj	ects Mani	ufacturing Proc	urement	Sales Ser	rvice Re	porting	Utilities –	8	х			
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Customer Name Big Bagaa Contact Name Tarry for Commercial Type Clas Salesman Julanda Order Invoice						\$0005 *												
						7/05/2022 1			Billing address PO Box 1985 New Town Shipping address									
	Billing Customer Big Bargains Billing Contact Order Currency South African Rand Exchange Rate					arryn Snow CUSTOME	•		29 Dune New Tow Durban	Ave n	.⊥ ▼							
	Tax Rate 15.00 🖕						Addresses Relate		References									
	SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	Based	CcyPric			
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Op	en Windows 🔻							User	: JulandaK	17/05/2022	Version :	2.5.0.8	xample Company	/2.5.0.8	3 //			



- The Select the option as desired message will display.
- Click on the radio button to select either Print Order, Email Order or Print and Email Order.

When selecting to Email the Quote, the quote will be emailed via the BPO Email Service on the server and **not** from MS Outlook.

- The example has **Print Order** selected.
- Click on **Accept** to proceed.

\$ 7					View	Customer	Order - (DR0000342 -	BPO: Version	1 2.5.0.8 - Exa	mple Com	oany v2.5.0).8			_		x
-	Home	Equipment /	Locations	Contract	Financ	e/HR Ir	nventory	Maintenan	ce / Projects	Manufacturi	ng Proc	rement	Sales Se	rvice Re	porting	Utilities -	- 8	ж
Back Maint	Save Layo	ut Print S Orde	ales Print P er Inv Print	roforma roice														\$
Custo	omer Name	Big Bargains			•	Refe	erence S	SO005						Billing ac	ldress			
Cor	ntact Name Commercial	Tarryn Snow CUSTOMER CONTACT Type Class Commercial			 Status I Order Date & Time 17/0 			17/05/2022	▼ 15:41:5	9 🗘				PO Box 1985 New Town			* •	
Salesman Julanda Kessler			~	•									Shipping	address				
Billing Customer Big Bargains Order Currency South African Rand				•	Billing Contact Tarryn Snow CUSTOMER CONTACT Exchange Rate 1							29 Dune Ave New Town Durban			* *			
	Tax Rate 15.00 🌻			Select the option as desired 🗲 3 💷 🛪				o x			Addresses	Related	References					
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- The Sales Order or the Proforma Invoice (this will depend on the print option you made earlier) will display in the **Preview** screen.
- You can make cosmetic changes to the document, as well as Save,
 Print, Export, Add a Watermark or Email the Sales Order or Proforma Invoice.
- Click on **Close** to return to the **Sales Quotes for Customer** screen.



For a detailed handling of this topic refer to Orders - Print Sales Order or Orders - Print Proforma Invoice



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