

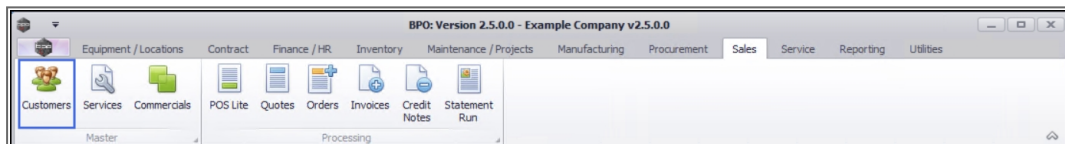
We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – CALL HISTORY

The **Call History** tile can be found in both the Customer Listing and the Customer Maintain screen. This tile will direct you to a data grid of history regarding Calls linked to a specific customer.

Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will display.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Active**.
4. Click in the **row** of the customer for whom you wish to view the **Call History** for.
5. Click on the **Call History** tile.

Customer Listing - BPO: Version 2.4.0.11 - Example Company

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

Add Edit Delete Sync View Save Layout Workspaces Hold Release Approve Account Deduct Account

Processing Format Status Processing Current Reports Print

Enter text to search...

Functions

Notes

Contacts

Addresses

Documents

Call History

Project History

History

Equipment

CustomerCode CustomerType CustomerName Department DeptName SiteDescription CustomerCreditLimit CustomerWebSite CustomerPhoneNumber CustomerVATNo

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	0000000000
HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789
TTA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369
BOT0001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
BET0001	RE	Bettes Summer Shop at t...			Durban	0.00			1234
biancad	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			123456789

Open Windows

User : JulandaK 03/12/2020 Version : 2.4.0.11 Example Company

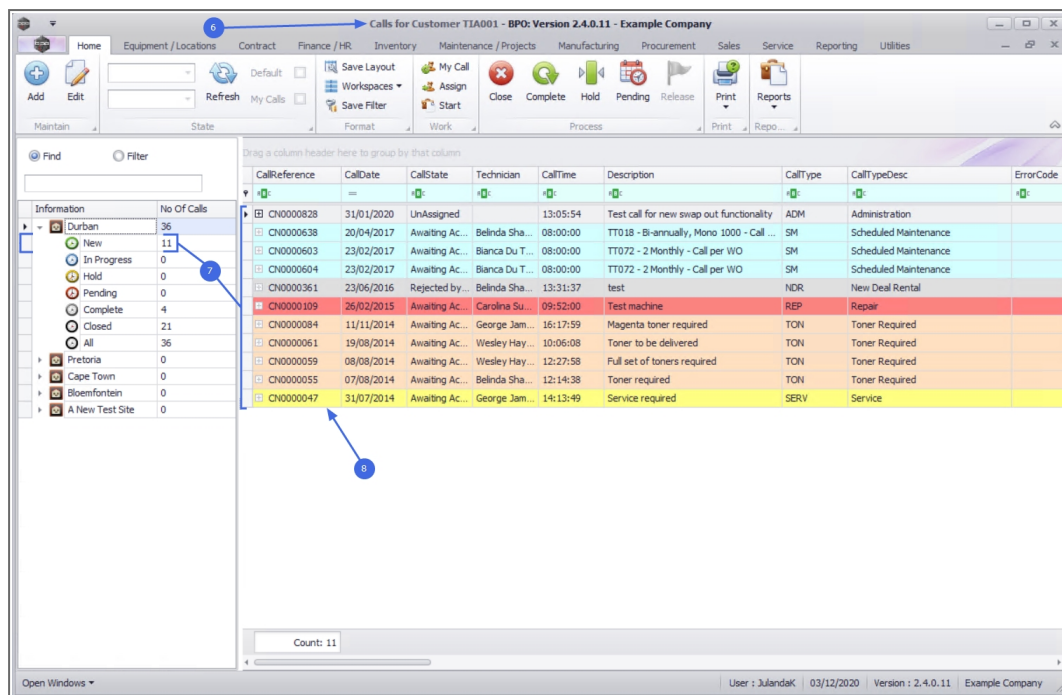
6. The **Calls for Customer** [customer code] screen will display.

CALLS DATA GRID

- By default, all **New** calls linked for the selected customer will display.
- The Calls are colour-coded by **Call Type**, e.g. all **Service** Calls are displayed as yellow.



Call Type Colours can be configured according to your company requirements.



INFORMATION PANEL

9. The **Information** panel lists the number of calls for each Call Status.
10. You can select to view any Call Status, by clicking on one of the **Call Status** discs on the left of the panel.
 - The example has the **Closed** Call Status selected and all the Closed calls for the customer are displayed in the **Calls for Customer** data grid.

Calls for Customer T1A001 - BPO: Version 2.4.0.11 - Example Company

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

My Call | Save Layout | Workspaces | Assign | Close | Complete | Hold | Pending | Release | Print | Reports

Find | Filter

Information | No Of Calls

- Durban 36
- New 11
- In Progress 0
- Hold 0
- Pending 0
- Complete 4
- Closed 21
- All 36
- Pretoria 0
- Cape Town 0
- Bloemfontein 0
- A New Test Site 0

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	CtrlLoc
CH0000367	07/09/2016	Rejected by	Bianca Du T...	13:23:40	Work flow test	REP	Repair	EC	Error Code	2020-10201	
CH0000366	07/09/2016	Rejected by	Bianca Du T...	10:56:03	Work flow notification email test	TEST	Testing	CON	Contract Service		New Gr
CH0000320	07/06/2016	No Signature	Bianca Du T...	08:03:44	Machine needs a service	SERV	Service			19-12-1207	
CH0000319	06/06/2016	Ended Work	Bianca Du T...	17:00:32	Check machine to see if requested acc.	INST	Installation			2020-10201	
CH0000318	06/06/2016	Ended Work	Bianca Du T...	16:42:03	Large streaks across pages on print	REP	Repair			2020-10201	
CH0000316	06/06/2016	Ended Work	Bianca Du T...	16:33:00	Machine not switching on	REP	Repair			19-12-1207	
CH0000301	01/04/2016	Rejected by	Bianca Du T...	09:14:01	test	SERV	Service	EC	Error Code	19-12-10207	
CH0000288	28/03/2016	No Signature	Bianca Du T...	16:08:22	Test auto supply test	INST	Installation			2020-10201	
CH0000225	18/11/2015	No Signature	Wesley Har...	14:45:59	Test partial returns	SERV	Service			19-12-1207	
CH0000222	18/11/2015	Ended Work	Bianca Du T...	11:36:55	Test partial non stock procurement pro...	WIC	Warranty Claim			19-12-1207	
CH0000123	27/02/2015	Unassigned		10:54:00	Machine service due	SERV	Service			19-12-1207	
CH0000115	26/02/2015	Unassigned		11:11:46	Check toner levels	TON	Toner Required			19-12/1201	
CH0000082	06/11/2014	Rejected by	Bianca Du T...	13:11:57	3M5 - 3 Month Service	SM	Scheduled Maintenance			20-12345-S...	South R
CH0000079	06/11/2014	Rejected by	Bianca Du T...	13:10:28	3M5 - 3 Month Service	SM	Scheduled Maintenance				
CH0000071	23/09/2014	Accepted	Steven Co...	13:49:09	Toner for delivery and machine service	SERV	Service			19-12-1207	
CH0000065	21/08/2014	Accepted	Belinda Sha...	09:00:09	test	REP	Repair				New Gr
CH0000037	21/07/2014	Ended Work	Bianca Du T...	11:48:24	Machine service required	SERV	Service	FA	Faulty	20-12345-S...	
CH0000032	26/06/2014	Unassigned		12:03:50	Delivery	SERV	Service			19-12-1207	
CH0000029	19/06/2014	Accepted	Belinda Sha...	12:53:31	Paper jam	SERV	Service			19-12-1207	
CH0000028	13/06/2014	Accepted	Belinda Sha...	14:43:23	New Installation	NDS	New Deal Sale				
CH0000027	16/05/2014	Unassigned		08:35:44	COR 4125 - Machine installation	NDS	New Deal Sale				

Count: 21

User : JulandaK | 03/12/2020 | Version : 2.4.0.11 | Example Company

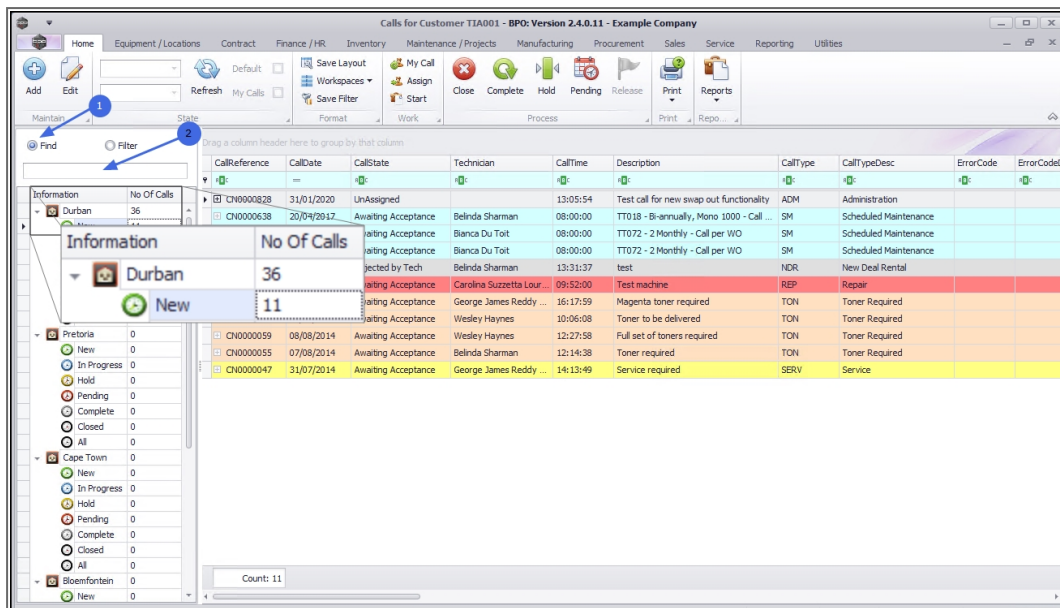
FIND OPTION

The Find option allows you to search for a specific Call, regardless of site, status or date range, using the **Call Reference** number.

1. Make sure that the **'Find'** radio button is selected.
2. In the text box, type in the full **Call Reference** number that you wish to find, then press **Enter**.



Note that the example is currently open in the Durban Site and the Status is set to New.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
CN00000828	31/01/2020	UnAssigned	Belinda Sharman	13:05:54	Test call for new swap out functionality	ADM	Administration		
CN00000638	20/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT018 - Bi-annually, Mono 1000 - Call ...	SM	Scheduled Maintenance		
		Awaiting Acceptance	Belinda Sharman	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
		Awaiting Acceptance	Belinda Sharman	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
		ected by Tech	Belinda Sharman	13:31:37	test	NDR	New Deal Rental		
		Awaiting Acceptance	Carolina Suzzetta Lou...	09:52:00	Test machine	REP	Repair		
		Awaiting Acceptance	George James Reddy ...	16:17:59	Magenta toner required	TON	Toner Required		
		Awaiting Acceptance	Wesley Haynes	10:06:08	Toner to be delivered	TON	Toner Required		
		Awaiting Acceptance	Wesley Haynes	12:27:58	Full set of toners required	TON	Toner Required		
		Awaiting Acceptance	Belinda Sharman	12:14:38	Toner required	TON	Toner Required		
		Awaiting Acceptance	George James Reddy ...	14:13:49	Service required	SERV	Service		

3. The example is set to search for **CN0000222**.

- The system has filtered for this Call Reference number and selected it.

4. The search has resulted in the Call being located in the **Closed** status.



Note that if the full reference number is not entered, the system will not be able to search for the specific Call and will return an **error** message.

Calls for Customer TIA001 - BPO: Version 2.4.0.11 - Example Company

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

Add Edit Refresh My Calls Save Layout Workspaces Save Filter Assign Start Close Complete Hold Pending Release Print Reports

Find Filter

CH0000222

Information No Of Calls

- Durban 36
 - New 11
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 4
 - Closed 21
- All 36
 - New 0
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 0
 - Closed 0
- Pretoria 0
 - New 0
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 0
 - Closed 0
- Cape Town 0
 - New 0
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 0
 - Closed 0
- Bloemfontein 0
 - New 0
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 0
 - Closed 0

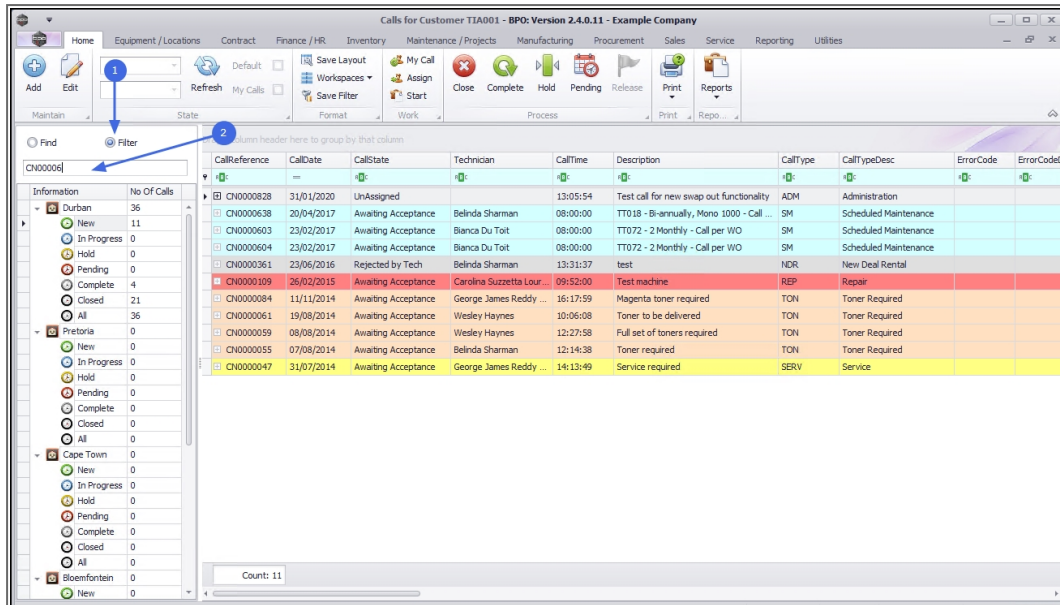
Count: 21

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
CH0000367	07/09/2016	Rejected by Tech	Bianca Du Toit	13:23:40	Work flow test	REP	Repair	EC	Error Code
CH0000366	07/09/2016	Rejected by Tech	Bianca Du Toit	10:56:03	Work flow notification email test	TEST	Testing	CON	Contract Se
CH0000320	07/06/2016	No Signature	Bianca Du Toit	08:03:44	Machine needs a service	SERV	Service		
CH0000319	06/06/2016	Ended Work	Bianca Du Toit	17:00:32	Check machine to see if requested acc...	INST	Installation		
CH0000318	06/06/2016	Ended Work	Bianca Du Toit	16:43:03	Large streaks across pages on print	REP	Repair		
CH0000316	06/06/2016	Ended Work	Bianca Du Toit	16:33:00	Machine not switching on	REP	Repair		
CH0000301	01/04/2016	Rejected by Tech	Bianca Du Toit	09:14:01	test	SERV	Service	EC	Error Code
CH0000298	29/03/2016	No Signature	Bianca Du Toit	16:08:22	Test auto apply task	INST	Installation		
CH0000225	18/11/2015	No Signature	Wesley Haynes	14:45:59	Test partial returns	SERV	Service		
CH0000222	18/11/2015	Ended Work	Bianca Du Toit	11:36:55	Test partial non stock procurement pro...	WC	Warranty Claim		
CH0000123	27/02/2015	Unassigned		10:54:00	Machine service due	SERV	Service		
CH0000115	26/02/2015	Unassigned		11:11:46	Check toner levels	TON	Toner Required		
CH0000082	06/11/2014	Rejected by Tech	Bianca Du Toit	13:11:57	3MS - 3 Month Service	SM	Scheduled Maintenance		
CH0000079	06/11/2014	Rejected by Tech	Bianca Du Toit	13:10:28	3MS - 3 Month Service	SM	Scheduled Maintenance		
CH0000071	23/09/2014	Accepted	Steven Cooper	13:49:09	Toner for delivery and machine service	SERV	Service		
CH0000065	21/08/2014	Accepted	Belinda Sharman	09:00:09	test	REP	Repair		
CH0000037	21/07/2014	Ended Work	Bianca Du Toit	11:48:24	Machine service required	SERV	Service	FA	Faulty
CH0000032	26/06/2014	Unassigned		12:03:50	Delivery	SERV	Service		
CH0000029	19/06/2014	Accepted	Belinda Sharman	12:53:31	Paper jam	SERV	Service		
CH0000028	13/06/2014	Accepted	Belinda Sharman	14:43:23	New Installation	NDS	New Deal Sale		
CH0000027	16/05/2014	Unassigned		08:35:44	COR 4125 - Machine installation	NDS	New Deal Sale		

FILTER OPTION

The Filter option allows you to specify a range of Calls by typing the prefix or part of the Call Reference number.

1. Make sure that the '**Filter**' radio button is selected.
2. Type the **Call Reference** number up to the point where you would like to display the range and press **Enter**.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorDesc
CN0000028	31/01/2020	UnAssigned		13:05:54	Test call for new swap out functionality	ADM	Administration		
CN0000038	20/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT018 - Bi-annually, Mono 1000 - Call ...	SM	Scheduled Maintenance		
CN0000063	23/02/2017	Awaiting Acceptance	Blanca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
CN0000064	23/02/2017	Awaiting Acceptance	Blanca Du Toit	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance		
CN00000361	23/06/2016	Rejected by Tech	Belinda Sharman	13:31:37	test	NDR	New Deal Rental		
CN00000109	26/02/2015	Awaiting Acceptance	Carolina Suzzetta Lou...	09:53:00	Test machine	REP	Repair		
CN00000084	11/11/2014	Awaiting Acceptance	George James Reddy ...	16:17:59	Magenta toner required	TON	Toner Required		
CN00000061	19/08/2014	Awaiting Acceptance	Wesley Haynes	10:06:08	Toner to be delivered	TON	Toner Required		
CN00000059	08/08/2014	Awaiting Acceptance	Wesley Haynes	12:27:58	Full set of toners required	TON	Toner Required		
CN00000055	07/08/2014	Awaiting Acceptance	Belinda Sharman	12:14:38	Toner required	TON	Toner Required		
CN00000047	31/07/2014	Awaiting Acceptance	George James Reddy ...	14:13:49	Service required	SERV	Service		

- The example has the Reference **CN00006** entered, which will search for and display all the Call References that start with CN00006.



Note that the Call Reference column filter row added the '%' variable at the end of the Call Reference, and the Edit Filter row now contains the filter details: **[Call Reference] Like 'CN00006%'**.

- To **remove** the Filter, either, **Delete** or **backspace** over the text in the in the Filter Row of the **Call Reference** column, or click on the **[X]** in the **Edit Filter** row.

Applied Filter: [CallReference] Like 'CN00006%'

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	CtrlLoc
CH0000038	20/04/2017	Awaiting Ac...	Belinda Sha...	08:00:00	TT018 - Bi-annually, Mono 1000 - Call...	SM	Scheduled Maintenance			19-12-1207	South R...
CH00000503	23/02/2017	Awaiting Ac...	Bianca Du T...	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance				
CH00000504	23/02/2017	Awaiting Ac...	Bianca Du T...	08:00:00	TT072 - 2 Monthly - Call per WO	SM	Scheduled Maintenance			2020-10201	

Count: 3

Filter: [CallReference] Like 'CN00006%'

LOG A CALL

1. From the **Calls for Customer** [customer code] screen,
2. Click on **Add**.

6 Add

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

32

33

34

35

36

37

38

39

40

41

42

43

44

45

46

47

48

49

50

51

52

53

54

55

56

57

58

59

60

61

62

63

64

65

66

67

68

69

70

71

72

73

74

75

76

77

78

79

80

81

82

83

84

85

86

87

88

89

90

91

92

93

94

95

96

97

98

99

100

101

102

103

104

105

106

107

108

109

110

111

112

113

114

115

116

117

118

119

120

121

122

123

124

125

126

127

128

129

130

131

132

133

134

135

136

137

138

139

140

141

142

143

144

145

146

147

148

149

150

151

152

153

154

155

156

157

158

159

160

161

162

163

164

165

166

167

168

169

170

171

172

173

174

175

176

177

178

179

180

181

182

183

184

185

186

187

188

189

190

191

192

193

194

195

196

197

198

199

200

201

202

203

204

205

206

207

208

209

210

211

212

213

214

215

216

217

218

219

220

221

222

223

224

225

226

227

228

229

230

231

232

233

234

235

236

237

238

239

240

241

242

243

244

245

246

247

248

249

250

251

252

253

254

255

256

257

258

259

260

261

262

263

264

265

266

267

268

269

270

271

272

273

274

275

276

277

278

279

280

281

282

283

284

285

286

287

288

289

290

291

292

293

294

295

296

297

298

299

300

301

302

303

304

305

306

307

308

309

310

311

312

313

314

315

316

317

318

319

320

321

322

323

324

325

326

327

328

329

330

331

332

333

334

335

336

337

338

339

340

341

342

343

344

345

346

347

348

349

350

351

352

353

354

355

356

357

358

359

360

361

362

363

364

365

366

367

368

369

370

371

372

373

374

375

376

377

378

379

380

381

382

383

384

385

386

387

388

389

390

391

392

393

394

395

396

397

398

399

400

401

402

403

404

405

406

407

408

409

410

411

412

413

414

415

416

417

418

419

420

421

422

423

424

425

426

427

428

429

430

431

432

433

434

435

436

437

438

439

440

441

442

443

444

445

446

447

448

449

450

451

452

453

454

455

456

457

458

459

460

461

462

463

464

465

466

467

468

469

470

471

472

473

474

475

476

477

478

479

480

481

482

483

484

485

486

487

488

489

490

491

492

493

494

495

496

497

498

499

500

501

502

503

504

505

506

507

508

509

510

511

512

513

514

515

516

517

518

519

520

521

522

523

524

525

526

527

528

529

530

531

532

533

534

535

536

537

538

539

540

541

542

543

544

545

546

547

548

549

550

551

552

553

554

555

556

557

558

559

560

561

562

563

564

565

566

567

568

569

570

571

572

573

574

575

576

577

578

579

580

581

582

583

584

585

586

587

588

589

590

591

592

593

594

595

596

597

598

599

600

601

602

603

604

605

606

607

608

609

610

611

612

613

614

615

616

617

618

619

620

621

622

623

624

625

626

627

628

629

630

631

632

633

634

635

636

637

638

639

640

641

642

643

644

645

646

647

648

649

650

651

652

653

654

655

656

657

658

659

660

661

662

663

664

665

666

667

668

669

670

671

672

673

674

675

676

677

678

679

680

681

682

683

684

685

686

687

688

689

690

691

692

693

694

695

696

697

698

699

700

701

702

703

704

705

706

707

708

709

710

711

712

713

714

715

716

717

718

719

720

721

722

723

724

725

726

727

728

729

730

731

732

733

734

735

736

737

738

739

740

741

742

743

744

745

746

747

748

749

750

751

752

753

754

755

756

757

758

759

760

761

762

763

764

765

766

767

768

769

770

771

772

773

774

775

776

777

778

779

780

781

782

783

784

785

786

787

788

789

790

791

792

793

794

795

796

797

798

799

800

801

802

803

804

805

806

807

808

809

810

811

812

813

814

815

816

817

818

819

820

821

822

823

824

825

826

827

828

829

830

831

832

833

834

835

836

837

838

839

840

841

842

843

844

845

846

847

848

849

850

851

852

853

854

855

856

857

858

859

860

861

862

863

864

865

866

867

868

869

870

871

872

873

874

875

876

877

878

879

880

881

882

883

884

885

886

887

888

889

890

891

892

893

894

895

896

897

898

899

900

901

902

903

904

905

906

907

908

909

910

911

912

913

914

915

916

917

918

919

920

921

922

923

924

925

926

927

928

929

930

931

932

933

934

935

936

937

938

939

940

941

942

943

944

945

946

947

948

949

950

951

952

953

954

955

956

957

958

959

960

961

962

963

964

965

966

967

968

969

970

971

972

973

974

975

976

977

978

979

980

981

982

983

984

985

986

987

988

989

990

991

992

993

994

995

996

997

998

999

1000

1001

1002

1003

1004

1005

1006

1007

1008

1009

1010

1011

1012

1013

1014

1015

1016

1017

1018

1019

1020

1021

1022

1023

1024

1025

1026

1027

1028

1029

1030

1031

1032

1033

1034

1035

1036

1037

1038

1039

1040

1041

1042

1043

1044

1045

1046

1047

1048

1049

1050

1051

1052

1053

1054

1055

1056

1057

1058

1059

1060

1061

1062

1063

1064

1065

1066

1067

1068

1069

1070

1071

1072

1073

1074

1075

1076

1077

1078

1079

1080

1081

1082

1083

1084

1085

1086

1087

1088

1089

1090

1091

1092

1093

1094

1095

1096

1097

1098

1099

1100

1101

1102

1103

1104

1105

1106

1107

1108

1109

1110

1111

1112

1113

1114

1115

1116

1117

1118

1119

1120

1121

1122

1123

1124

1125

1126

1127

1128

1129

1130

1131

1132

1133

1134

1135

1136

1137

1138

1139

1140

1141

1142

1143

1144

1145

1146

1147

1148

1149

1150

1151

1152

1153

1154

1155

1156

1157

1158

1159

1160

1161

1162

1163

1164

1165

1166

1167

1168

1169

1170

1171

1172

1173

1174

1175

1176

1177

1178

1179

1180

1181

1182

1183

1184

1185

1186

1187

1188

1189

1190

1191

1192

1193

1194

1195

1196

1197

1198

1199

1200

1201

1202

1203

1204

1205

1206

1207

1208

1209

1210

1211

1212

1213

1214

1215

1216

1217

1218

1219

1220

1221

1222

1223

1224

1225

1226

1227

1228

1229

1230

1231

1232

1233

1234

1235

1236

1237

1238

1239

1240

1241

1242

1243

1244

1245

1246

1247

1248

1249

1250

1251

1252

1253

1254

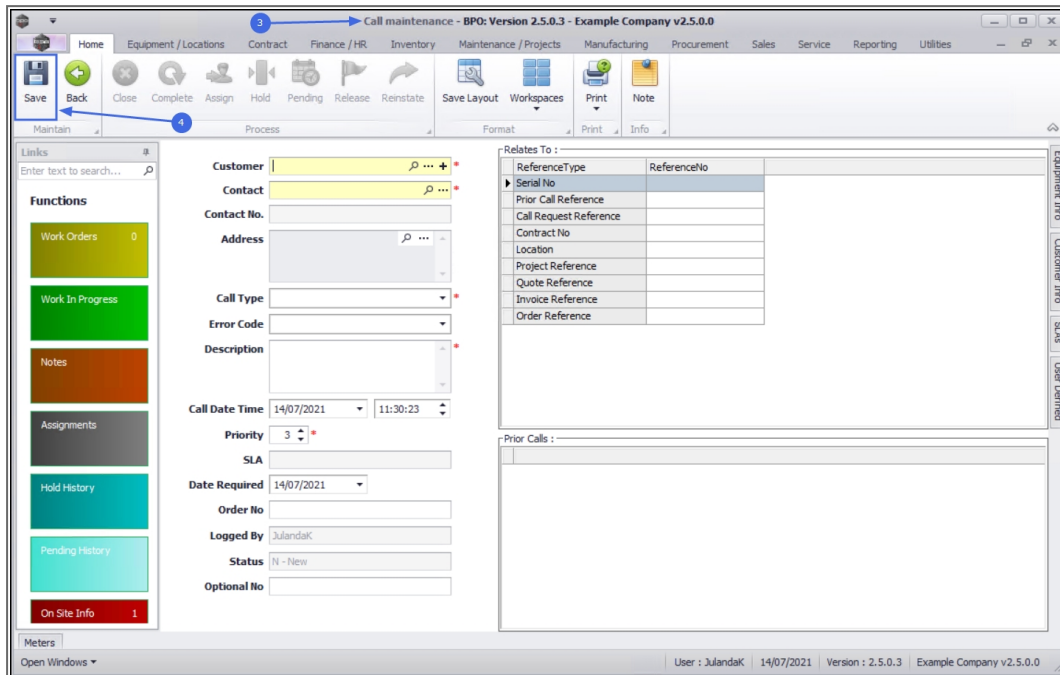
1255

1256

1257

1

3. "The Call maintenance screen will be displayed." on page 4
4. Complete the Call information for the Customer and click on **Save**.



EDIT A CALL

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site** and **Call Status**.
 - The example has **Durban** and **New** call status selected.
3. Click on the **row** of the Call you wish to edit.
4. Click on **Edit**.

5. "Call Details" on page 4

6. Make the necessary changes to the Call information and click on **Save**.

STATE PANEL

In the State panel the following filters are not available in this view, because all the calls linked to the specific customer are displayed:

- **Start Date,**
- **End Date,**
- **Default** and
- **My Calls.**

The **Refresh** button will update the **Calls for Customer** screen with the latest version of the information. Any changes made from the ribbon will be updated in the Call List data grid.

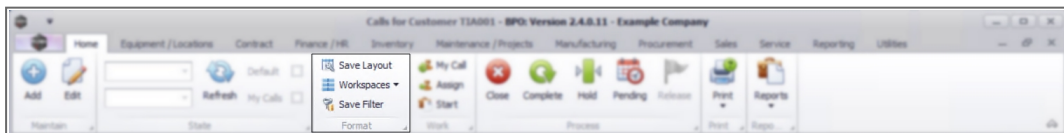


FORMAT PANEL

Any changes that you may have made to the **Calls for Customer** screen e.g. changing the column order or resizing columns, will return to the original layout when you exit the screen. By clicking on **Save Layout**, **Workspaces** or **Save Filter** in the **Format** panel, will save your settings for the next time you select a customer and open this screen.



[For a detailed handling of this topic refer to BPO2 Data Grid Layouts](#)



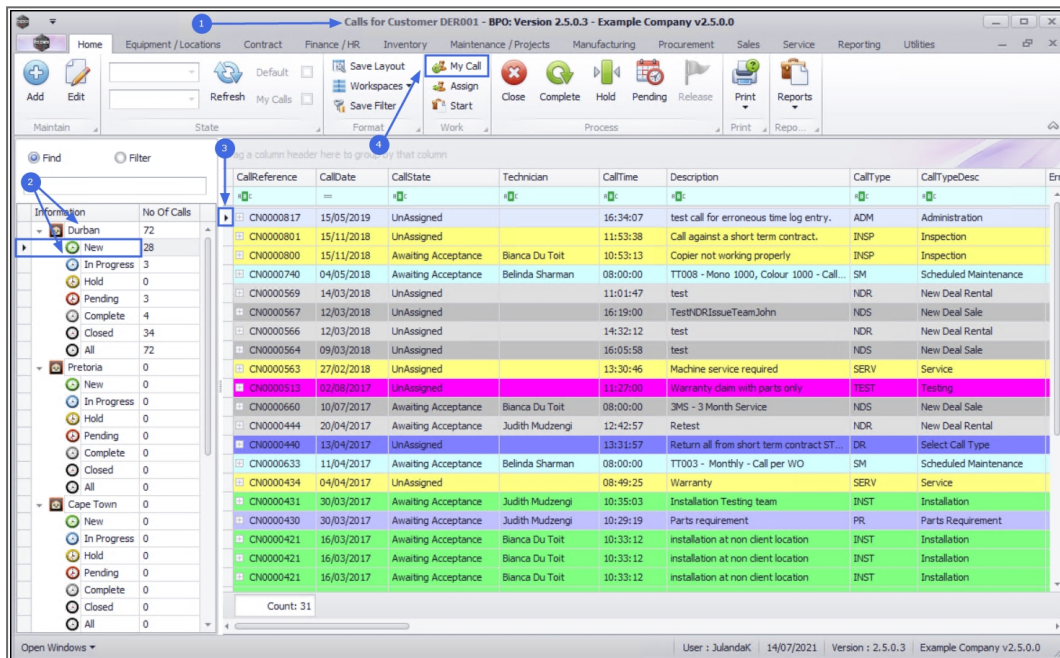
MY CALL

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site** and the **Call Status**.
 - The example has **Durban** and **New** call status selected.
3. Click on the **row** of the Call you wish to assign to yourself.



Note that the Technician field is currently empty and the Call State is UnAssigned.

4. Click on **My Call**.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH0000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration
CH0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CH0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CH0000740	04/05/2018	Awaiting Acceptance	Belinda Sharmen	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Maintenance
CH0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
CH0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
CH0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
CH0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
CH0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
CH0000513	02/08/2017	UnAssigned		11:27:09	Warranty claim with parts only	TEST	Testing
CH0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
CH0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
CH0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call Type
CH0000633	11/04/2017	Awaiting Acceptance	Belinda Sharmen	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenance
CH0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
CH0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
CH0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requirement
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation

5. When you receive the **Input Validation** message to confirm;
 - **This call, [call ref number], is in status - [status]. Do you still want to take ownership?**
6. Click on **Yes**.

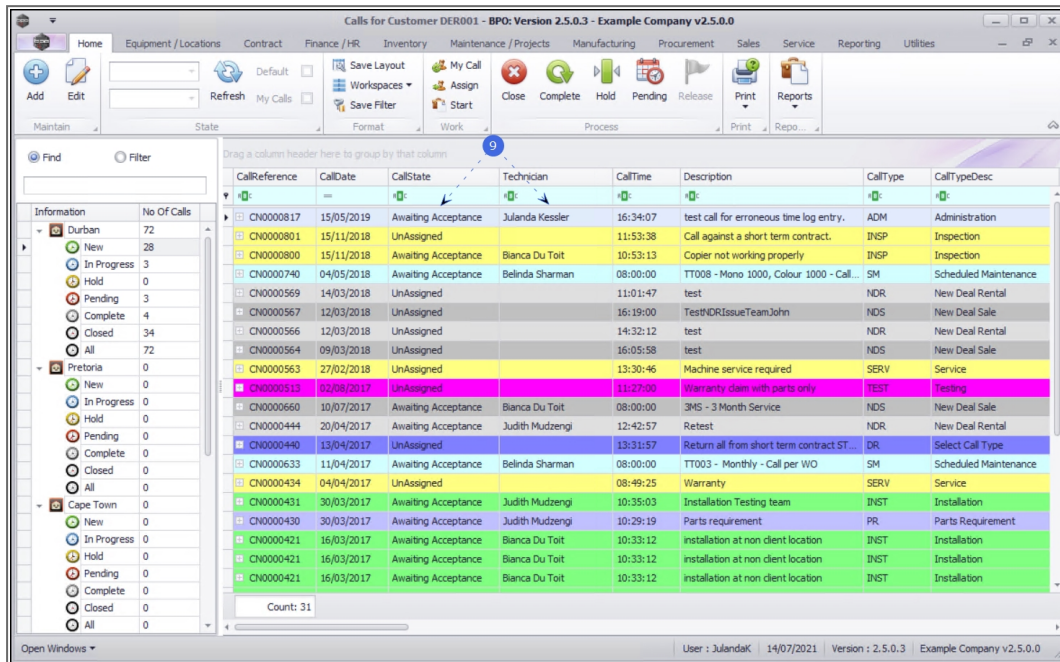
The screenshot shows the 'Calls for Customer DER001' window. A dialog box titled 'Input Validation' is displayed over the call list. The dialog contains the text: 'This call, CN0000817, is in status - New. Do you still want to take ownership?'. There are 'Yes' and 'No' buttons. A blue arrow points from the 'Yes' button to the 'Call Processing' dialog in the next screenshot.

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration
CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Maintenance
CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
CN0000566						NDR	New Deal Rental
CN0000564						NDS	New Deal Sale
CN0000563						NDS	New Deal Sale
CN0000560						SERV	Service
CN0000444						TEST	Testing
CN0000440						NDS	New Deal Sale
CN0000633						NDR	New Deal Rental
CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SM	Scheduled Maintenance
CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	SERV	Service
CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	INSP	Inspection
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	PR	Parts Requirement
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation

7. Next you will receive the **Call Processing** message to confirm;
 - **Ownership of call, reference [call ref number], has been successful.**
8. Click on **OK**.

The screenshot shows the same 'Calls for Customer DER001' window. A dialog box titled 'Call Processing' is displayed. It contains a blue information icon and the text: 'Ownership of call, reference CN0000817, has been successful.' There is an 'OK' button. A blue arrow points from the 'OK' button to the next step in the process.

- The call has now been updated with the name of the **Technician** currently logged on to the system and the **Call Status** has changed to **Awaiting Acceptance**.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH00000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Administration
CH00000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CH00000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CH00000740	04/05/2018	Awaiting Acceptance	Belinda Sharnan	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Maintenance
CH00000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
CH00000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
CH00000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
CH00000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
CH00000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
CH00000513	02/08/2017	UnAssigned		11:27:08	Warranty claim with parts only	TEST	Testing
CH00000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
CH00000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
CH00000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call Type
CH00000633	11/04/2017	Awaiting Acceptance	Belinda Sharnan	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenance
CH00000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
CH00000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
CH00000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requirement
CH00000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH00000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH00000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation

ASSIGN A CALL

By assigning an employee to a call, will move the call to the **In Progress** status. By assigning the call to a Technician, Driver, or Responsible Person will identify who will be working on the call.

- From the **Calls for Customer** [customer code] screen,
- Select the **Site** and the **Call Status**.
 - The example has **Durban** and **New** call status selected.
- Click on the **row** of the Call you wish to assign.

Note that the **Technician** field is currently empty and the **Call State** is **UnAssigned**.

- Click on **Assign**.

1. Click on the 'My Call' button in the top right corner of the 'Calls for Customer DER001' window.

2. Click on the 'Assign' button in the top right corner of the 'Calls for Customer DER001' window.

3. Drag a column header here to group by that column.

4. Click on the 'Assign' button in the top right corner of the 'Calls for Customer DER001' window.

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Administration
CH0000801	15/11/2018	UnAssigned	Julanda Kessler	11:53:38	Call against a short term contract.	INSP	Inspection
CH0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CH0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Maintenance
CH0000569	14/03/2018	UnAssigned	Belinda Sharman	11:01:47	test	NDR	New Deal Rental
CH0000567	12/03/2018	UnAssigned	Belinda Sharman	16:19:00	TestNDRIssueTeamJohn	NDR	New Deal Rental
CH0000566	12/03/2018	UnAssigned	Belinda Sharman	14:32:12	test	NDR	New Deal Rental
CH0000564	09/03/2018	UnAssigned	Belinda Sharman	16:05:58	test	NDR	New Deal Rental
CH0000563	27/02/2018	UnAssigned	Belinda Sharman	13:30:46	Machine service required	SERV	Service
CH0000513	02/08/2017	UnAssigned	Belinda Sharman	11:27:00	Warranty claim with parts only	TEST	Testing
CH0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
CH0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
CH0000440	13/04/2017	UnAssigned	Judith Mudzengi	13:31:57	Return all from short term contract ST...	DR	Select Call Type
CH0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenance
CH0000434	04/04/2017	UnAssigned	Belinda Sharman	08:49:25	Warranty	SERV	Service
CH0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
CH0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requirement
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation

Count: 31

5. "The Call Assignment: Reference No: [call ref number] screen will be displayed." on page 4

6. Complete the Call Assignment information and click **Save** when done.

5. Click on the 'Save' button in the top left corner of the 'Call Assignment: Reference No.: CH0000801' window.

6. Click on the 'Save' button in the top left corner of the 'Call Assignment: Reference No.: CH0000801' window.

Assigned To: [Dropdown]

Detail: Call against a short term contract.

Assignment Date: 14/07/2021 14:25:05

Assigned By: Julanda Kessler

Create new Work Order ☐

Open Work Orders

WOCode	Description
WO0002279	Call against a short term contract.

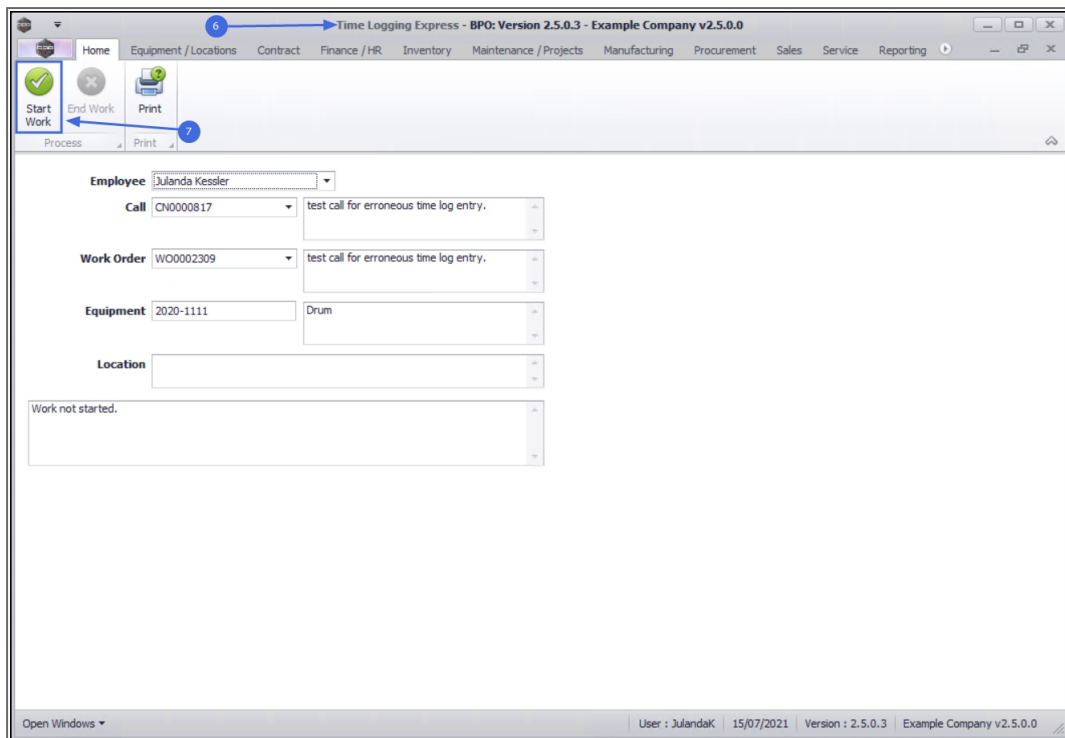
START WORK

Use the **Start Work** feature to **Start** and **End** work on Calls that you are working on. A Call must be in the **New** status to Start Work, and will then move to the **In Progress** status where you can continue the process until End Work.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site**.
 - The example has **Durban** selected.
3. Ensure that the **Call Status** is set to **New**.
4. Click on the **row** of the Call you wish to start work on.
5. Click on **Start**.

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	Administration
CH0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CH0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CH0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Ma
CH0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Ren
CH0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
CH0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Ren
CH0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
CH0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
CH0000513	02/08/2017	UnAssigned		11:27:06	Warranty claim with parts only	TEST	Testing
CH0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
CH0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Ren
CH0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call Ty
CH0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Ma
CH0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
CH0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
CH0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Require
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation

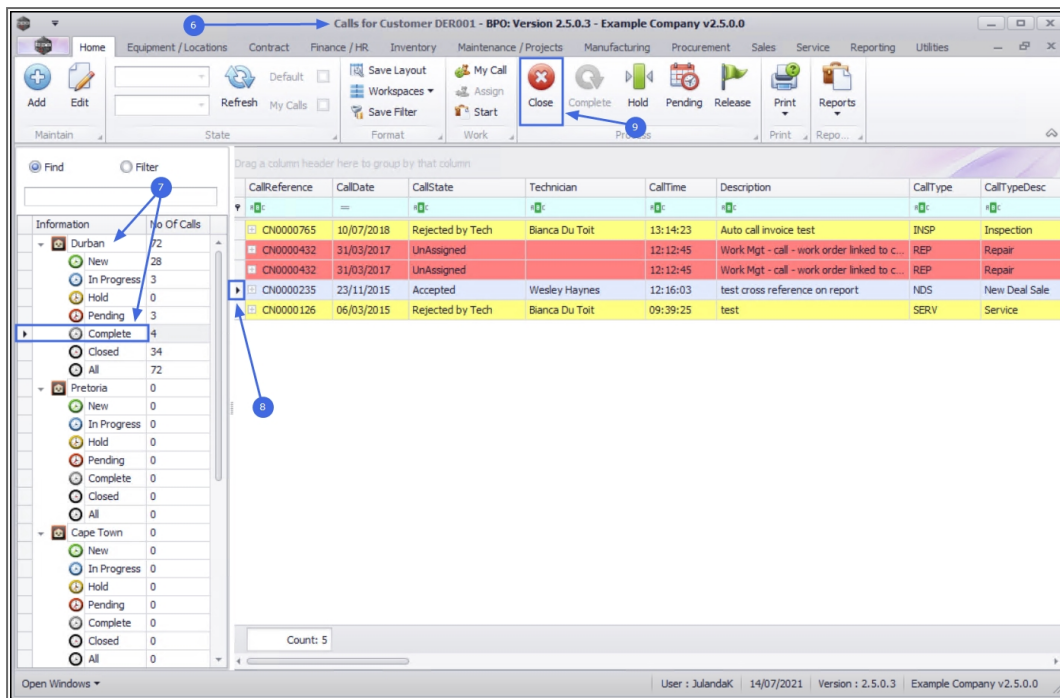
6. " The Time Logging Express screen will be displayed." on page 3
7. Complete the Time logging screen and click on **Start Work**.



CLOSE A CALL

When a call has been closed, it cannot be re-opened, and can only be viewed. You will receive a notification when trying to close a Call that have outstanding items, such as billable items not yet invoiced, linked to the call.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site** and **Call Status**.
 - The example has **Durban** selected and the status has been set to **Complete**.
3. Click on the **row** of the Call you wish to close.
4. Click on **Close**.



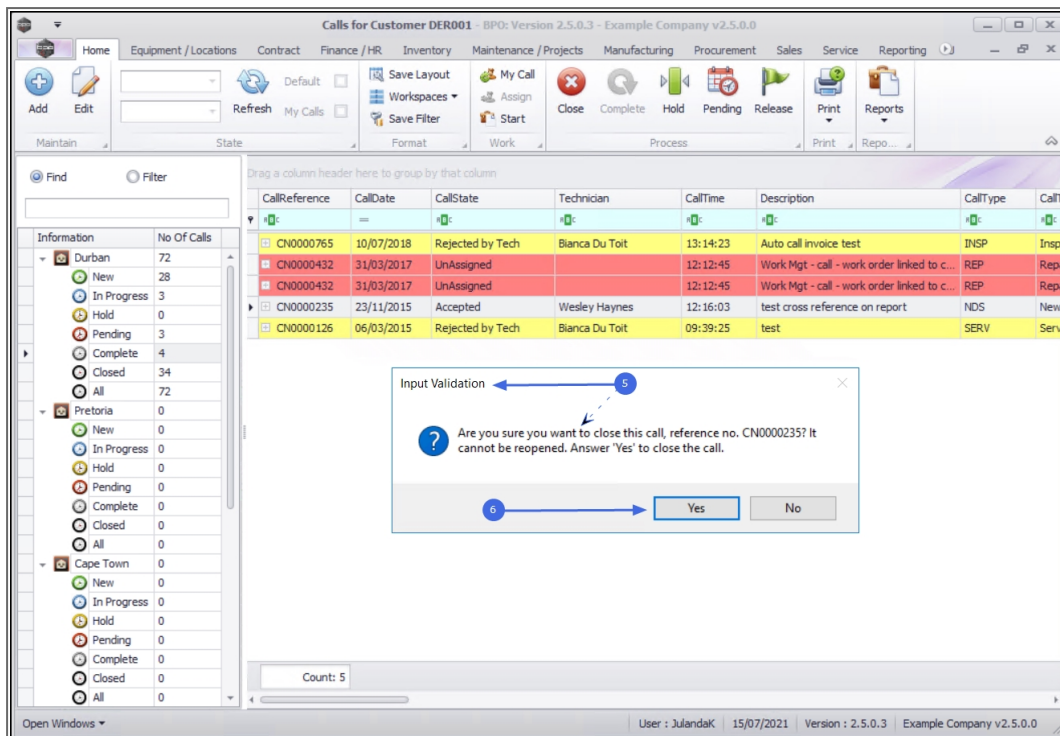
5. When you receive the **Input Validation** message to confirm;

- **Are you sure you want to close this call, reference no. [call ref number]? It cannot be reopened. Answer 'Yes' to close the call.**

6. Click on **Yes**.



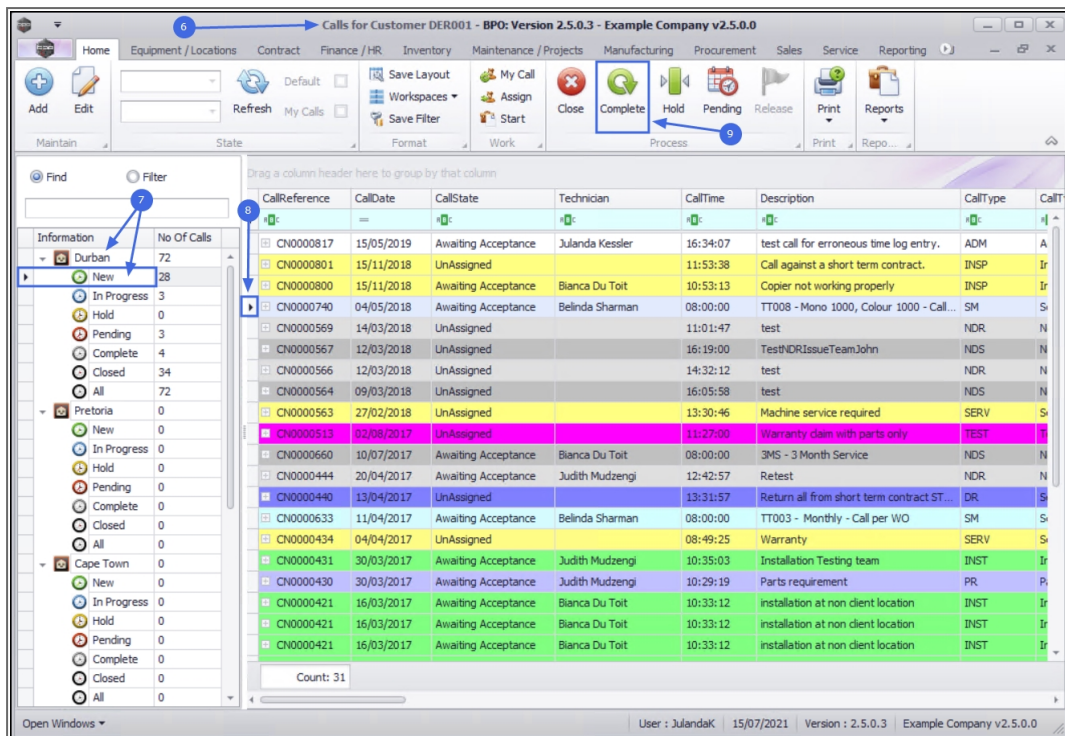
For a detailed handling of this topic refer to [Calls - Close a Call](#)



COMPLETE A CALL

Once the Technician has completed the work required, the call can be set to **Completed**.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site** and **Call Status**.
 - The example has **Durban** selected and the call status is **New**.
3. Click on the **row** of the Call you wish to complete.
4. Click on **Complete**.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallT
CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry.	ADM	A
CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Ir
CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Ir
CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Si
CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	N
CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	N
CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	N
CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	N
CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Si
CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty claim with parts only	TEST	Tr
CN0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	N
CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	N
CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Si
CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Si
CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Si
CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Ir
CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	P
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir

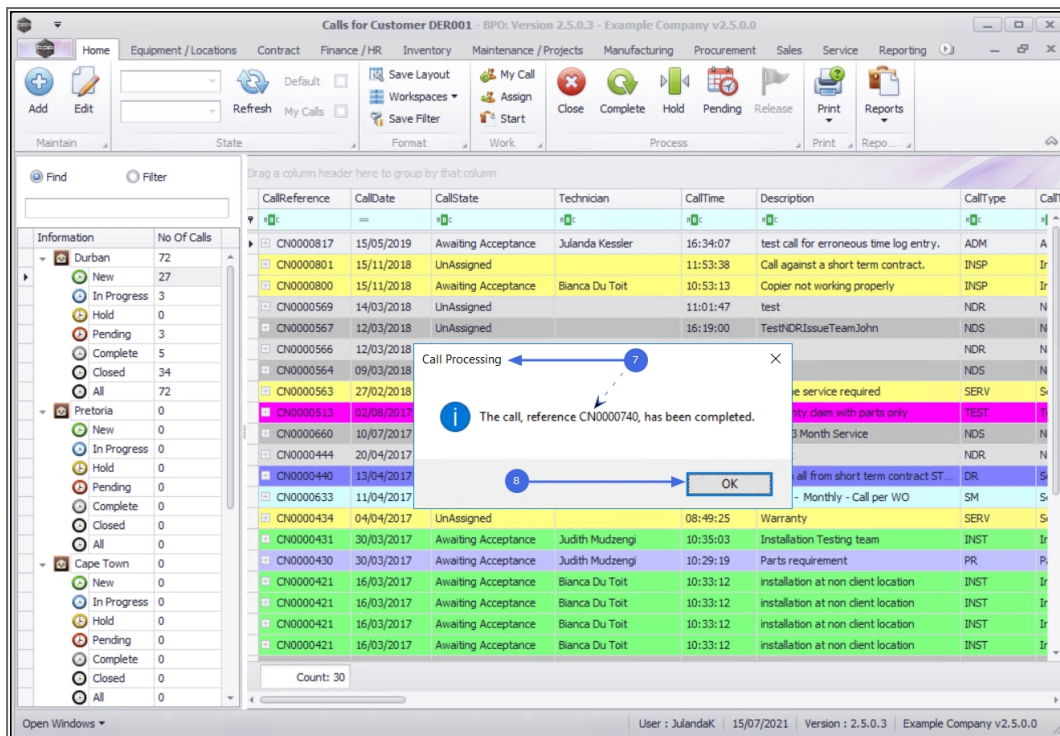
5. When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to complete this call, reference no. [call ref number]? Answer 'Yes' to complete the call.**
6. Click on **Yes**.

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallT
CN0000817	15/05/2019	Awaiting Acceptance	Julanda Kessler	16:34:07	test call for erroneous time log entry..	ADM	A
CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Ir
CN0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Ir
CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	NDR	N
CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	N
CN0000567	12/03/2018	Awaiting Acceptance	John			NDS	N
CN0000566	12/03/2018	Awaiting Acceptance				NDR	N
CN0000564	09/03/2018	Awaiting Acceptance				NDS	N
CN0000563	27/03/2018	Awaiting Acceptance				SERV	S
CN0000513	02/03/2018	Awaiting Acceptance				TEST	Ir
CN0000660	10/03/2018	Awaiting Acceptance				NDS	N
CN0000444	20/03/2018	Awaiting Acceptance				NDR	N
CN0000440	13/03/2018	Awaiting Acceptance				DR	S
CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	S
CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	S
CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Ir
CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	P
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir
CN0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Ir

7. Next you will receive the **Call Processing** message to confirm that;
 - **The call, reference [call ref number], has been completed.**
8. Click on **OK**.



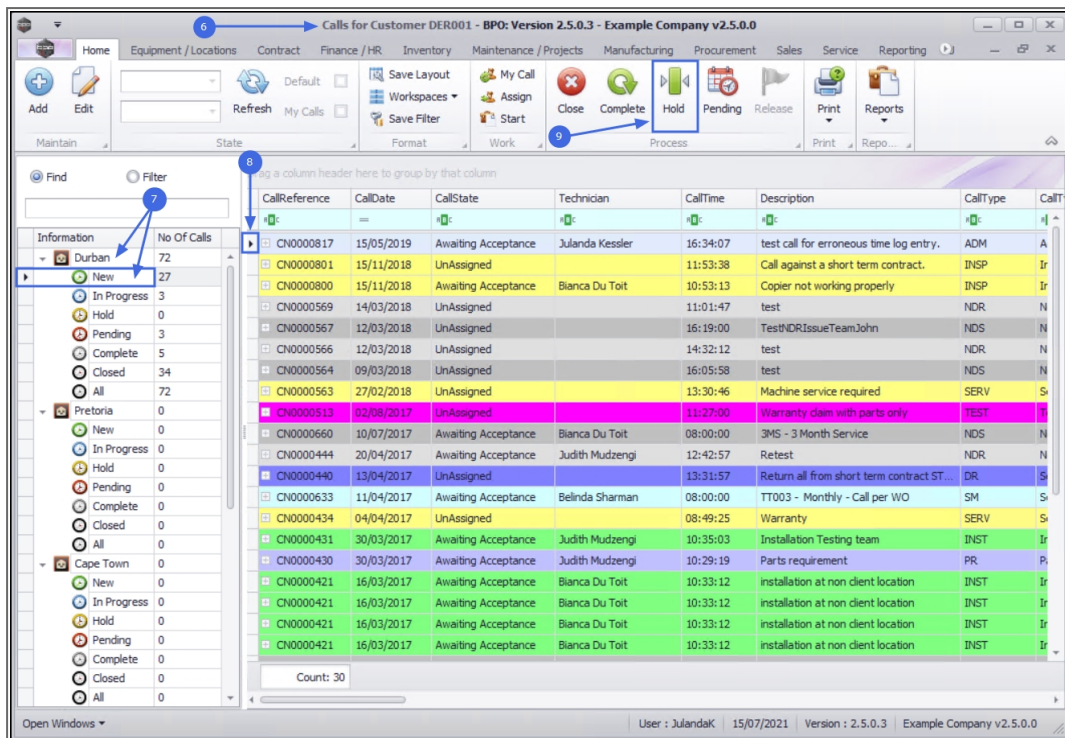
For a detailed handling of this topic refer to Calls - Complete a Call



PLACE CALL ON HOLD

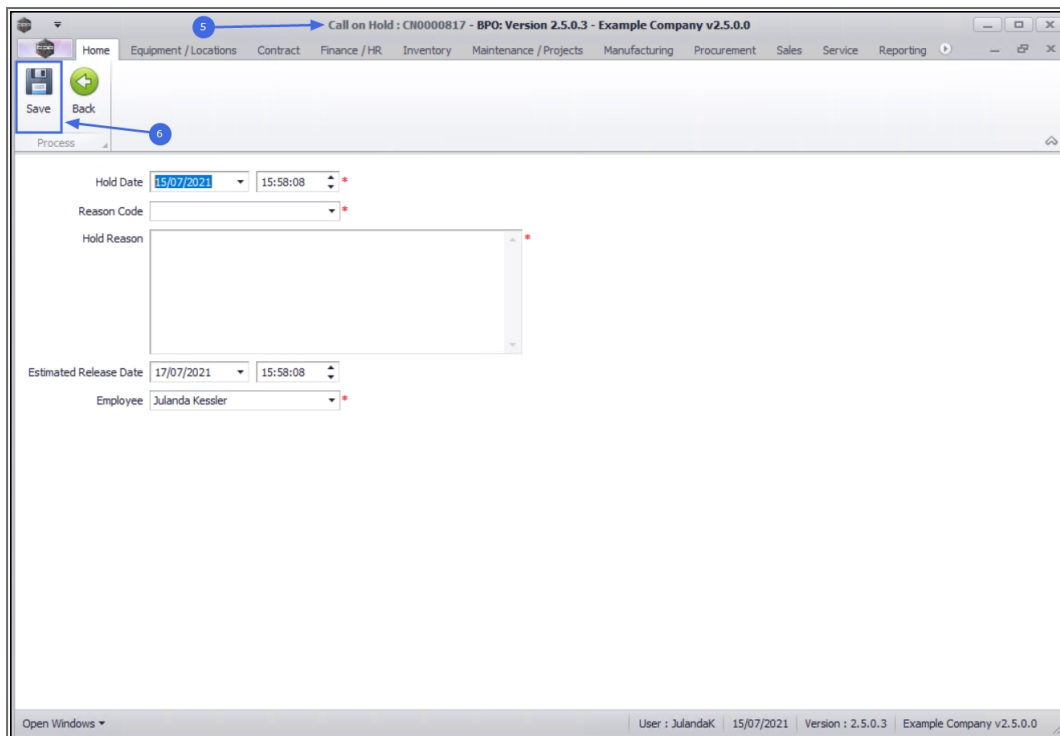
Placing a call on **Hold** will result in work being stopped to resolve a client/customer issue e.g there is no one available on site to allow a technician access to a location, or the client is awaiting approval from their finance department before a new part request can be fitted. The [SLA Monitor](#) will "pause" until the call is **Released** from **Hold**.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site**.
 - The example has **Durban** selected and the call status is **New**.
3. Click on the **row** of the Call you wish to place on hold.
4. Click on **Hold**.



5. The **Call on Hold** : [call ref number] screen will be displayed.
6. Complete the hold information for the call and click on **Save**.

For a detailed handling of this topic refer to **Calls - Place on Hold**



MOVE TO PENDING

Placing a Call in a **Pending** status differs from placing a call on Hold. A call is placed in a pending status when work needs to be stopped to resolve a company issue, e.g. lack of stock to complete the work. The [SLA Monitor](#) will continue to run.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site**.
 - The example has **Durban** selected.
3. The **Call Status** must be in either the **New** or **In Progress** status.
4. Click on the **row** of the Call you wish to place in pending.
5. Click on **Pending**

1 → Calls for Customer DER001 - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

2 → Filter

3 → Pending

4 → CallReference

5 → Pending

Information	No Of Calls	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
Durban	72	CH0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
New	26	CH0000800	15/11/2018	Awaiting Acceptance	Bianca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
In Progress	3	CH0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Re
Hold	1	CH0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sa
Pending	3	CH0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Re
Complete	5	CH0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sa
Closed	34	CH0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
All	72	CH0000513	02/08/2017	UnAssigned		11:27:00	Warranty claim with parts only	TEST	Testing
Pretoria	0	CH0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sa
New	0	CH0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Re
In Progress	0	CH0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call T
Hold	0	CH0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled M
Pending	0	CH0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
Complete	0	CH0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
Closed	0	CH0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requir
All	0	CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Cape Town	0	CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
New	0	CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
In Progress	0	CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Hold	0	CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
Pending	0	CH0000357	23/06/2016	Awaiting Acceptance	Bianca Du Toit	10:20:00	test	NDS	New Deal Sa
Complete	0								
Closed	0								
All	0								

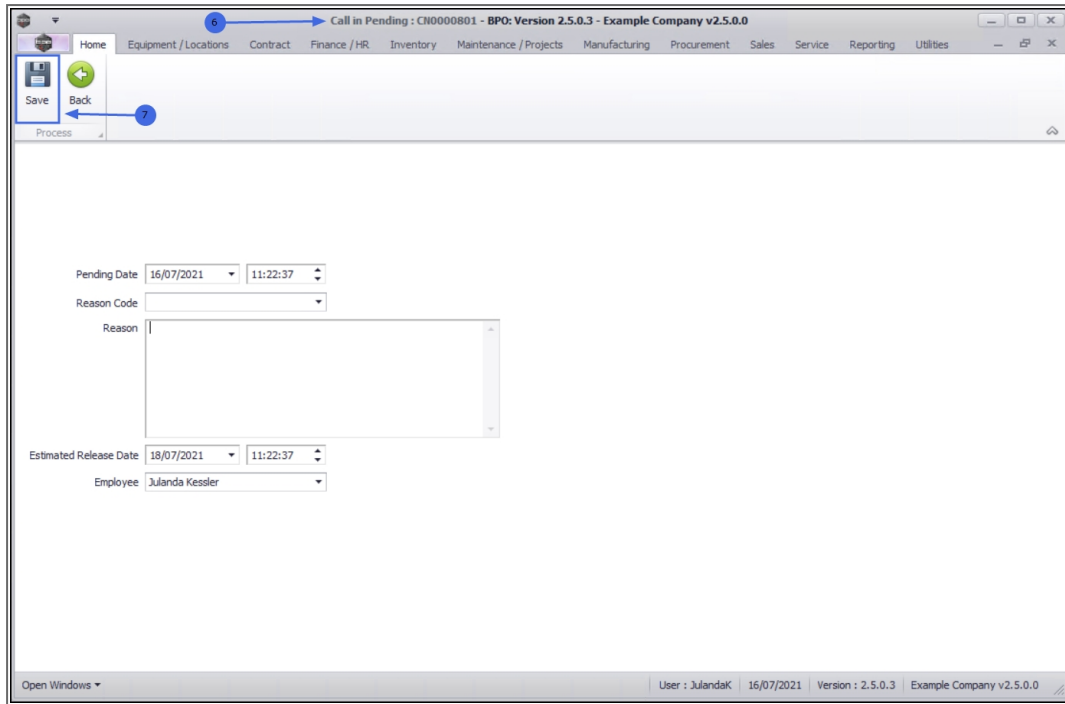
Count: 29

User : JulandaK | 16/07/2021 | Version : 2.5.0.3 | Example Company v2.5.0.0

6. The **Call in Pending** : [call ref number] screen will be displayed.
7. Complete the pending information for the call and click on **Save**.



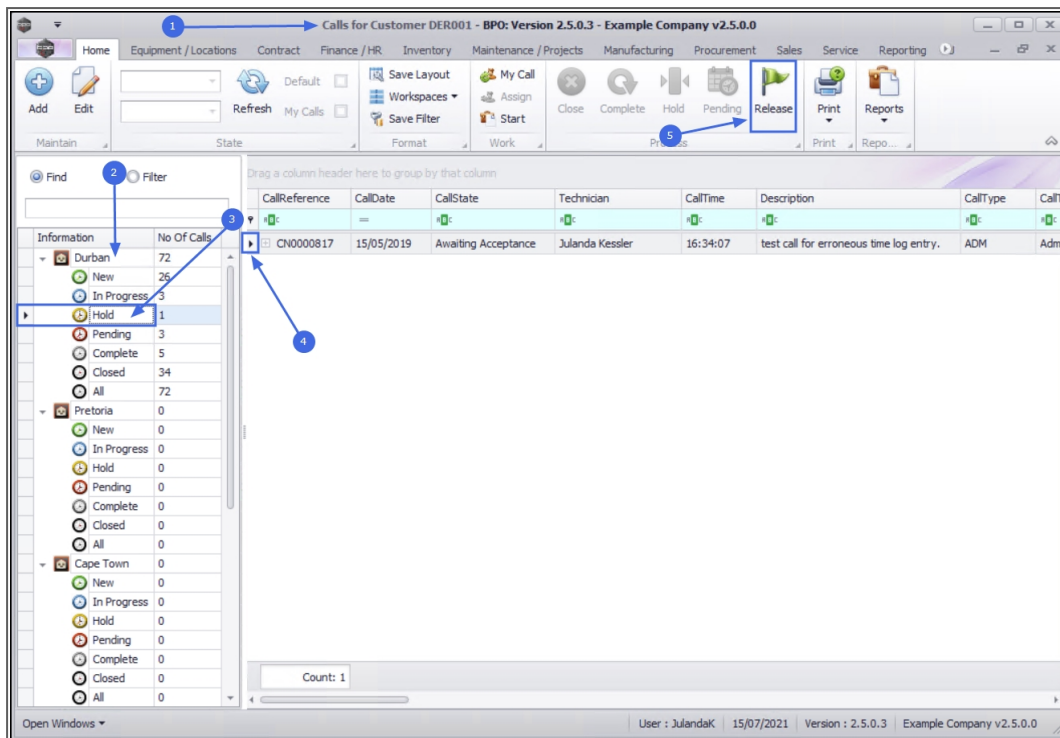
For a detailed handling of this topic refer to [Calls - Move to Pending Status](#)



RELEASE A CALL

When a call is released, it will move back to the **New** status where it can be re-assigned. When the call is re-assigned, a new work order should be created.

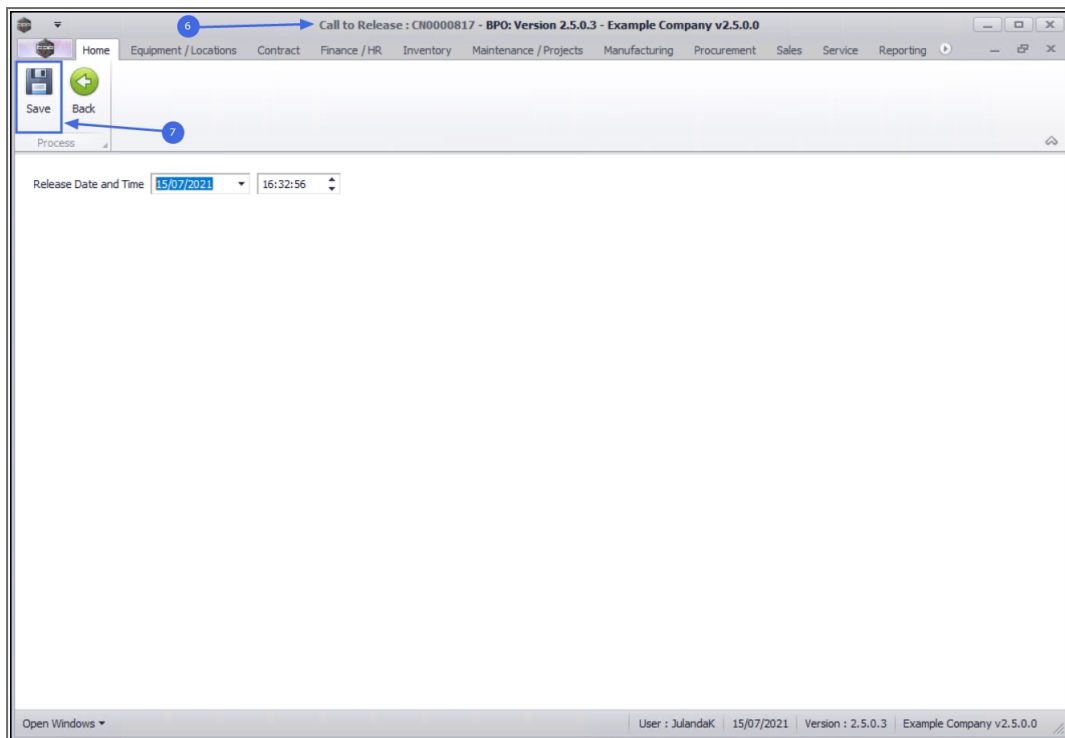
1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site**.
 - The example has **Durban** selected.
3. Ensure that the **Call Status** has been set to **Hold**.
4. Click on the **row** of the Call you wish to release from hold.
5. Click on **Release**.



6. The **Call to Release** : [call ref number] screen will be displayed.

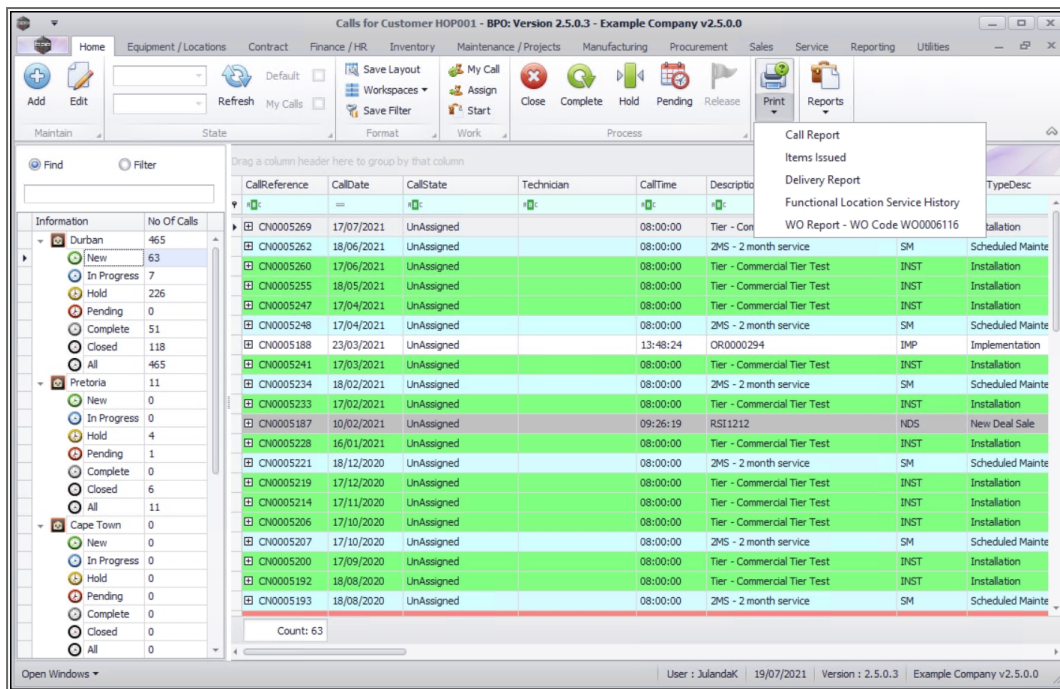
7. Complete the release information for the call and click on **Save**.

For a detailed handling of this topic refer to [Calls - Release a Call](#)



PRINT PANEL

You can [Print Call Report](#), [Items Issued History Report](#), [Delivery Report](#), Functional Location [Service History Report](#), or a [Work Order Report](#) for the **Call** from the **Calls for the Customer** screen, by selecting the **Print** button.



REPORTS PANEL

The **Reports** button allow you to print Reports regarding the Service Centre for:

1. **Calls**,
2. **Housekeeping**,
3. **Performance** and
4. **Troubleshooting** on Calls linked to the selected Customer.

Calls for Customer T1A001 - BPO: Version 2.4.0.11 - Example Company

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

My Call | Save Layout | Assign | My Calls | Start | Close | Complete | Hold | Pending | Release | Reports

Find | Filter

Information | No Of Calls

- Durban: 36
 - New: 11
 - In Progress: 0
 - Hold: 0
 - Pending: 0
 - Complete: 4
 - Closed: 21
 - All: 36
- Pretoria: 0
 - New: 0
 - In Progress: 0
 - Hold: 0
 - Pending: 0
 - Complete: 0
 - Closed: 0
 - All: 0
- Cape Town: 0
 - New: 0
 - In Progress: 0
 - Hold: 0
 - Pending: 0
 - Complete: 0
 - Closed: 0
 - All: 0
- Bloemfontein: 0
 - New: 0
 - In Progress: 0
 - Hold: 0
 - Pending: 0
 - Complete: 0
 - Closed: 0
 - All: 0

Count: 11

CallReference	CalDate	CalState	Technician	CalTime	Description
CH0000828	31/01/2020	Unassigned	Belinda Sha...	13:05:54	Test call for new swap out func...
CH0000638	20/04/2017	Awaiting Ac...	Belinda Sha...	08:00:00	TT018 - Bi-annually, Mono 1000 -
CH0000603	23/02/2017	Awaiting Ac...	Bianca Du T...	08:00:00	TT072 - 2 Monthly - Call per W/O
CH0000604	23/02/2017	Awaiting Ac...	Bianca Du T...	08:00:00	TT072 - 2 Monthly - Call per W/O
CH0000361	23/06/2016	Rejected by	Belinda Sha...	13:31:37	test
CH0000109	26/02/2015	Awaiting Ac...	Carolina Su...	09:52:00	Test machine
CH0000084	11/11/2014	Awaiting Ac...	George Jam...	05:17:59	Magenta toner required
CH0000061	19/08/2014	Awaiting Ac...	Wesley Hay...	10:36:08	Toner to be delivered
CH0000059	08/08/2014	Awaiting Ac...	Wesley Hay...	12:27:58	Full set of toners required
CH0000055	07/08/2014	Awaiting Ac...	Belinda Sha...	12:14:38	Toner required
CH0000047	31/07/2014	Awaiting Ac...	George Jam...	14:13:49	Service required

Service Centre

- Calls
 - Calls All with SLA Zone
 - Calls: All Calls
 - Calls: Call List
 - Calls: Closed in Period
 - Calls: Linked to Tasks
 - Calls: Repeats
 - Calls: SLA Status
 - Calls: With Open Work Order
 - Calls: Work Order Labour Info
- Housekeeping
- Performance
- Troubleshooting

Service Centre

ErrorCodeDesc	SerialNo	CtrlLoc
All Open Calls With SLA Zone	19-12-12037	
Call analysis report	19-12-12037	
Call List	19-12-1207	South R
Calls closed in period show	2020-10201	
List of all Service calls that	19-12-1207	
Call Repeats	19-12-1207	
Call SLA Status	19-12-1201	
Call centre listing with call	19-12-1201	
Call centre performance re	20-12345-S	
	19-12-1207	

User : Julandak | 03/12/2020 | Version : 2.4.0.11 | Example Company

MNU.061.022