

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

SERVICE

CALLS – LOG 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 [Call Centre Mode](#) notes.

Calls are primarily created when customers phone in for service related requirements.

Notes on Calls

- The **Call Listing** screen is used to log billable and non-billable **Service Calls** against contract and non-contract items, whether these are Assets or Locations.
- One or multiple [Work Orders](#) can exist within a call. Work Orders are likened to Job Cards or Work Instructions. [Work In Progress](#) transactions will be recorded against these work orders for the work that is required including Labour Time Booking, Parts, Expenses, Travel, Services and Sub Contract Work.
- Generally either an Asset or Location must be selected when logging the Call, and a Work Order is auto created when saving the Call. But this is dependant on your Company's system configuration. Refer to Specialized Call Configuration for more details about processing outside the standard processing.

¹BPO2 v2.5.1.3 or higher

- [New Deal Sale](#) and [New Deal Rental](#) processing will also process through the call centre screen to enforce the Work In Progress transactions for installation of Sale or Rental Items.
- Calls are [Assigned](#) to employees (such as Technicians or Drivers) in order to perform the work required. An employee must be set as a [Technician](#) in order to be available for assignment. Refer to TechConnect for more information related to our mobile application that Technicians can use out in the field.
- Once work has been completed Work In Progress transactions can then be [Invoiced](#) if required, dependant on the scenario.



If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can quickly update the details via the relevant **Ellipse** button in the call screen. Refer to [Calls - Edit Buttons](#)



You cannot log a call for a Customer on Hold. If you select a customer that is on hold, you will be asked if you would like to log a [Call Request](#) instead.



An optional telephone number can be added to the call, which will be for your reference, when logging or editing the call. Refer to "[Call Details](#)" on [page 4](#)

CALL LOGGING – DETAIL SELECTION METHODS

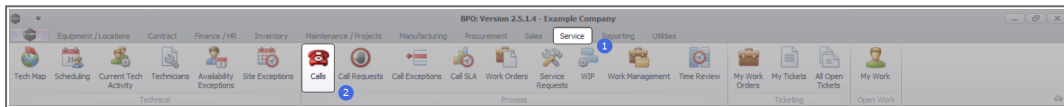
- Call details can be selected based on what information is given when the client phones in.
- For example, if a call is logged for a serialised item and the serial number is known, this can be selected first. Associated header information will auto populate, which makes the call logging

process faster.

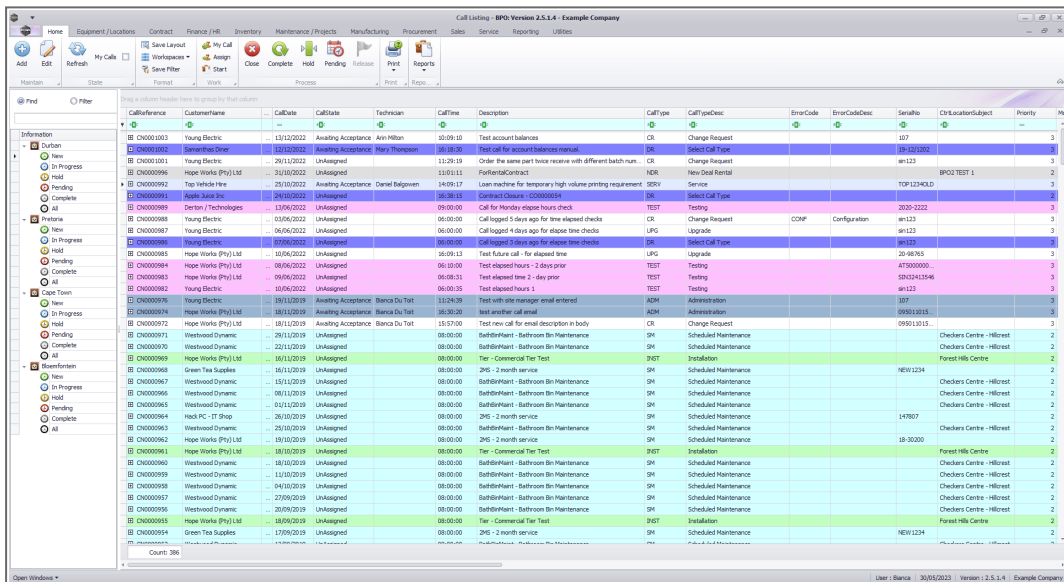
- In this manual, we will first look at the standard call logging process, and then include a few tips for [other call detail selection methods](#), such as first selecting the Serial Number or Location, Customer, Contact, or Telephone Number.

LOG A CALL

Ribbon Select Service > Calls



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



CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	CallLocationSubject	Priority	Max
BN CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Jon Hilborn	10:09:10	Test account balances	CR	Change Request			187		3	
BN CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			18123		3	
BN CH0000996	Hope Works (Pty) Ltd	21/03/2022	Unassigned		11:01:11	Printer/Labelled	CR	Change Request			18123		3	
BN CH0000992	Top Vehicle Hire	20/03/2022	Awaiting Acceptance	Daniel Redgum	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3	
BN CH0000991	Askle Java Inc	24/10/2022	Unassigned		05:36:15	Contract Closure - C0000054	CR	Select Call Type			2020-2222		3	
BN CH0000989	Deshon / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			18123		3	
BN CH0000988	Young Electric	10/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	18123		3	
BN CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			18123		3	
BN CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	CR	Select Call Type			18123		3	
BN CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-98905		3	
BN CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			47300000		3	
BN CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			52023415546		3	
BN CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			18123		3	
BN CH0000976	Young Electric	16/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:26	Test with site manager email entered	ADM	Administration			107		3	
BN CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	Test another call email	ADM	Administration			055012015		3	
BN CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			055012015		3	
BN CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2	
BN CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2	
BN CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2	
BN CH0000963	Westwood Dynamic	26/10/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2	
BN CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2	
BN CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	BathRoomHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2	
BN CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2	
BN CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2	

- 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.

Call Listing - BPO Version 2.5.1.4 - Example Company

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

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

Home State Process Format Work Start

Find Filter

Drop a column header here to group by that column

CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BT CH0001003	Young Electric	13/03/2023	Awaiting Acceptance	Ash Wilson	Test account balance	CR	Change Request			107		3
BT CH0001002	Silverstone Drive	12/03/2023	Awaiting Acceptance	Nery Thompson	Test call for account balance manual	SR	Select Call Type			09-10/100		3
BT CH0001001	Young Electric	26/11/2022	Unassigned		Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
BT CH0000996	Hope Works (Pty) Ltd	21/03/2023	Unassigned		Powerstat/switch	MR	New Deal Rental					3
BT CH0000992	Top Video Hire	20/03/2023	Awaiting Acceptance	Daniel Redgreen	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BT CH0000991	Askle Juss Inc	24/03/2023	Unassigned		Contact Closure - C00000394	SR	Select Call Type					3
BT CH0000989	Dexton / Technologies	13/04/2022	Unassigned		Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BT CH0000988	Young Electric	10/04/2022	Unassigned		Call logged 5 days ago for elapse time checks	CR	Change Request	CONF	Configuration	an123		3
BT CH0000987	Young Electric	06/04/2022	Unassigned		Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BT CH0000986	Young Electric	07/04/2022	Unassigned		Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BT CH0000985	Hope Works (Pty) Ltd	10/04/2022	Unassigned		Test future call - for elapsed time	UPG	Upgrade			20-9890		3
BT CH0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		Test elapsed hours - 2 days prior	TEST	Testing			47300000		3
BT CH0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		Test elapsed time 2 - day prior	TEST	Testing			SR02413546		3
BT CH0000982	Young Electric	16/04/2022	Unassigned		Test elapsed hours 1	TEST	Testing			an123		3
BT CH0000981	Young Electric	16/11/2019	Awaiting Acceptance	Bianca Du Toit	Test with live manager email entered	ADM	Administration			107		3
BT CH0000974	Hope Works (Pty) Ltd	16/11/2019	Awaiting Acceptance	Bianca Du Toit	Test another call email	ADM	Administration			095012915		3
BT CH0000972	Hope Works (Pty) Ltd	16/11/2019	Awaiting Acceptance	Bianca Du Toit	Test new call for email description in body	CR	Change Request			095012915		3
BT CH0000971	Westwood Dynamic	26/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000970	Westwood Dynamic	22/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		Tier - Commercial Tier Test	INOT	Installation				Forest Hills Centre	2
BT CH0000968	Green Tea Supplies	16/11/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BT CH0000967	Westwood Dynamic	15/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000966	Westwood Dynamic	08/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000965	Westwood Dynamic	01/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BT CH0000963	Westwood Dynamic	26/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		Tier - Commercial Tier Test	INOT	Installation			18-30300		2
BT CH0000960	Westwood Dynamic	18/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000959	Westwood Dynamic	11/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000958	Westwood Dynamic	04/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000957	Westwood Dynamic	27/09/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000956	Westwood Dynamic	20/09/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		Tier - Commercial Tier Test	INOT	Installation				Forest Hills Centre	2
BT CH0000954	Green Tea Supplies	17/09/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- Click on the **Add** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

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

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

Home State Process Format Work Start

Find Filter

Drop a column header here to group by that column

CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BT CH0001003	Young Electric	13/03/2023	Awaiting Acceptance	Ash Wilson	Test account balance	CR	Change Request			107		3
BT CH0001002	Silverstone Drive	12/03/2023	Awaiting Acceptance	Nery Thompson	Test call for account balance manual	SR	Select Call Type			09-10/100		3
BT CH0001001	Young Electric	26/11/2022	Unassigned		Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
BT CH0000996	Hope Works (Pty) Ltd	21/03/2023	Unassigned		Powerstat/switch	MR	New Deal Rental					3
BT CH0000992	Top Video Hire	20/03/2023	Awaiting Acceptance	Daniel Redgreen	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BT CH0000991	Askle Juss Inc	24/03/2023	Unassigned		Contact Closure - C00000394	SR	Select Call Type					3
BT CH0000989	Dexton / Technologies	13/04/2022	Unassigned		Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BT CH0000988	Young Electric	10/04/2022	Unassigned		Call logged 5 days ago for elapse time checks	CR	Change Request	CONF	Configuration	an123		3
BT CH0000987	Young Electric	06/04/2022	Unassigned		Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BT CH0000986	Young Electric	07/04/2022	Unassigned		Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BT CH0000985	Hope Works (Pty) Ltd	10/04/2022	Unassigned		Test future call - for elapsed time	UPG	Upgrade			20-9890		3
BT CH0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		Test elapsed hours - 2 days prior	TEST	Testing			47300000		3
BT CH0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		Test elapsed time 2 - day prior	TEST	Testing			SR02413546		3
BT CH0000982	Young Electric	16/04/2022	Unassigned		Test elapsed hours 1	TEST	Testing			an123		3
BT CH0000981	Young Electric	16/11/2019	Awaiting Acceptance	Bianca Du Toit	Test with live manager email entered	ADM	Administration			107		3
BT CH0000974	Hope Works (Pty) Ltd	16/11/2019	Awaiting Acceptance	Bianca Du Toit	Test another call email	ADM	Administration			095012915		3
BT CH0000972	Hope Works (Pty) Ltd	16/11/2019	Awaiting Acceptance	Bianca Du Toit	Test new call for email description in body	CR	Change Request			095012915		3
BT CH0000971	Westwood Dynamic	26/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000970	Westwood Dynamic	22/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		Tier - Commercial Tier Test	INOT	Installation				Forest Hills Centre	2
BT CH0000968	Green Tea Supplies	16/11/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BT CH0000967	Westwood Dynamic	15/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000966	Westwood Dynamic	08/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000965	Westwood Dynamic	01/11/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BT CH0000963	Westwood Dynamic	26/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		Tier - Commercial Tier Test	INOT	Installation			18-30300		2
BT CH0000960	Westwood Dynamic	18/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000959	Westwood Dynamic	11/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000958	Westwood Dynamic	04/10/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000957	Westwood Dynamic	27/09/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000956	Westwood Dynamic	20/09/2019	Unassigned		Subfloor/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BT CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		Tier - Commercial Tier Test	INOT	Installation				Forest Hills Centre	2
BT CH0000954	Green Tea Supplies	17/09/2019	Unassigned		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- The **Call maintenance** screen will be displayed.

Call maintenance - BPO Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Refinstate

Home State Process Format Workspaces Print Info

Customer: BT CH0001003

Contact No: BT CH0001003

Address: Silverstone Drive

Call Type: Awaiting Acceptance

Error Code: 107

Description: Test account balance

Call Date Time: 13/03/2023 13:10:32

Priority: 3

SLA: 13/03/2023

Date Required: 13/03/2023

Order No:

Logged By: Bianca

Status: In-Work

Optional No:

References To:

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls:

Processing: Quotes

User : Bianca 31/03/2023 Version : 2.5.1.4 Example Company

CALL DETAILS

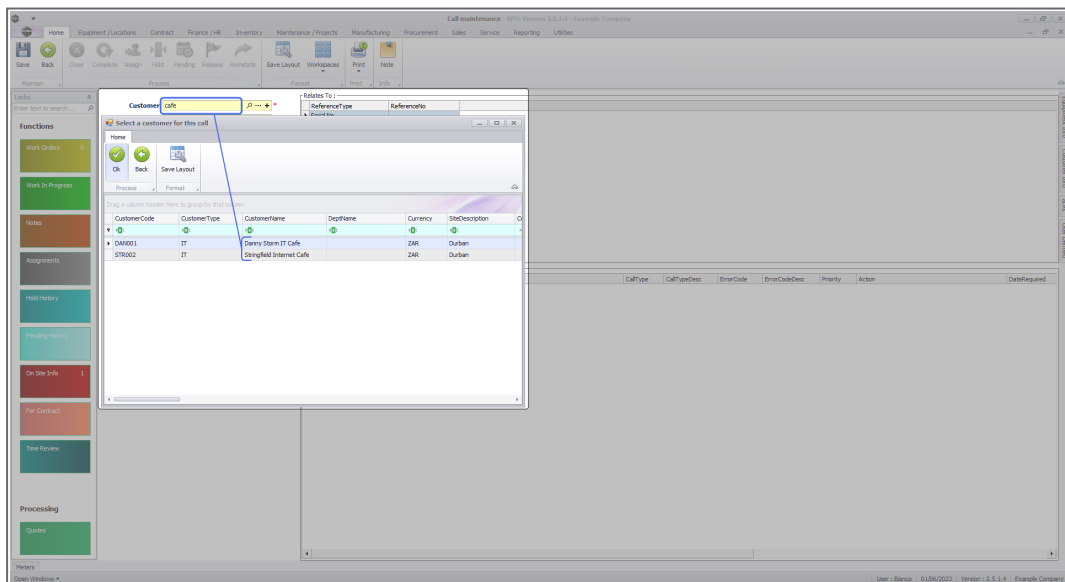
Customer: Search for and select the customer:

- The **yellow** colouring of the field indicates that you can search for the customer, using one of two methods.



Search Method 1:

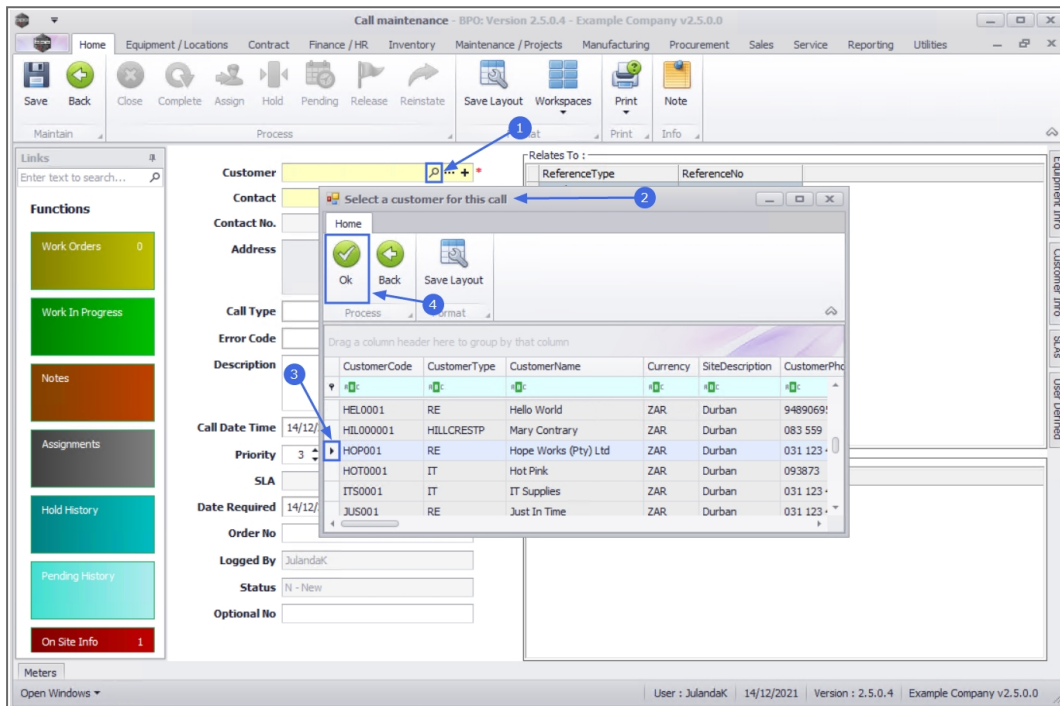
- Type in a part of the Customer Name in the Customer field and press **Enter**.
- The example has "cafe" typed in the field. When pressing Enter, the system will locate all the Customers that has "cafe" as part of the name.
 - If the system locates the Customer, then the screen will be populated with the customer information.
 - If more than one Customer exists, then the **Select a customer for this call screen** will display a list of the Customer's that have "cafe" forming a part of the name.
 - Skip to Select Customer below





Search Method 2:

- Click on the **search** button in the customer field.
- The **Select a customer for this call** screen will display, listing all Active Customers.
- Click on the **row** of the **customer** you wish to **log a call** for.
- Click on **OK**.



Call maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save | Back | Close | Complete | Assign | Hold | Pending | Release | Reinstate | Save Layout | Workspaces | Print | Note

Maintain | Process

Links: Enter text to search...

Functions

- Work Orders: 0
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info: 1

Customer

Contact: [Search] [X]

Contact No.:

Address:

Call Type:

Error Code:

Description:

Call Date Time: 14/12/2021

Priority: 3

SLA:

Date Required: 14/12/2021

Order No.:

Logged By: JulandaK

Status: N - New

Optional No.:

Select a customer for this call

Home | [OK] | [Back] | [Save Layout]

Process | Format

Drag a column header here to group by that column

CustomerCode	CustomerType	CustomerName	Currency	SiteDescription	CustomerPhone
HEL0001	RE	Hello World	ZAR	Durban	94890691
HIL000001	HILLCRESTP	Mary Contrary	ZAR	Durban	083 559
HOP001	RE	Hope Works (Pty) Ltd	ZAR	Durban	031 123
HOT0001	IT	Hot Pink	ZAR	Durban	093873
ITS0001	IT	IT Supplies	ZAR	Durban	031 123
JUS001	RE	Just In Time	ZAR	Durban	031 123

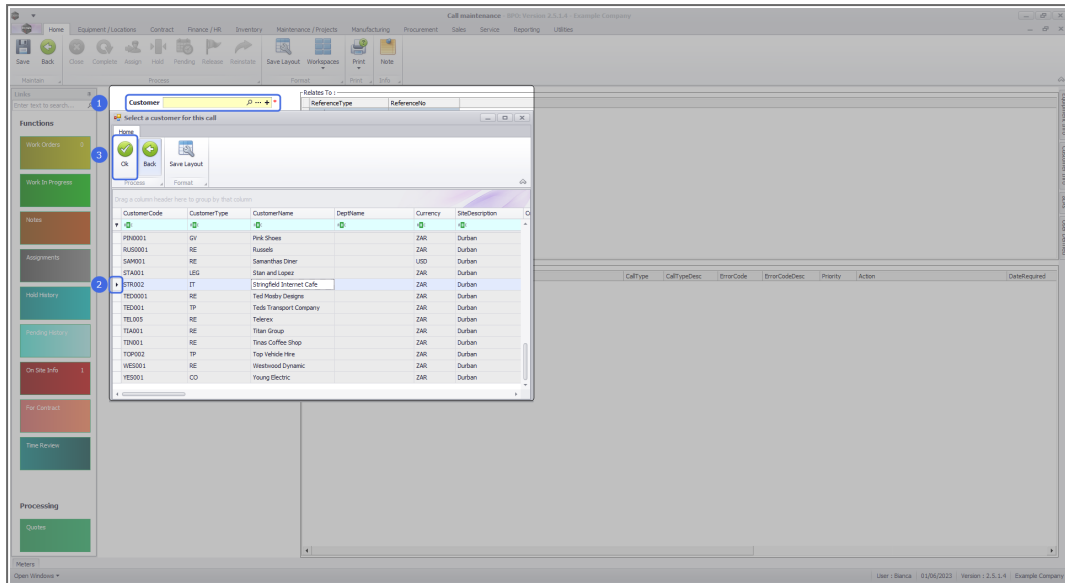
Meters | Open Windows

User: JulandaK | 14/12/2021 | Version: 2.5.0.4 | Example Company v2.5.0.0

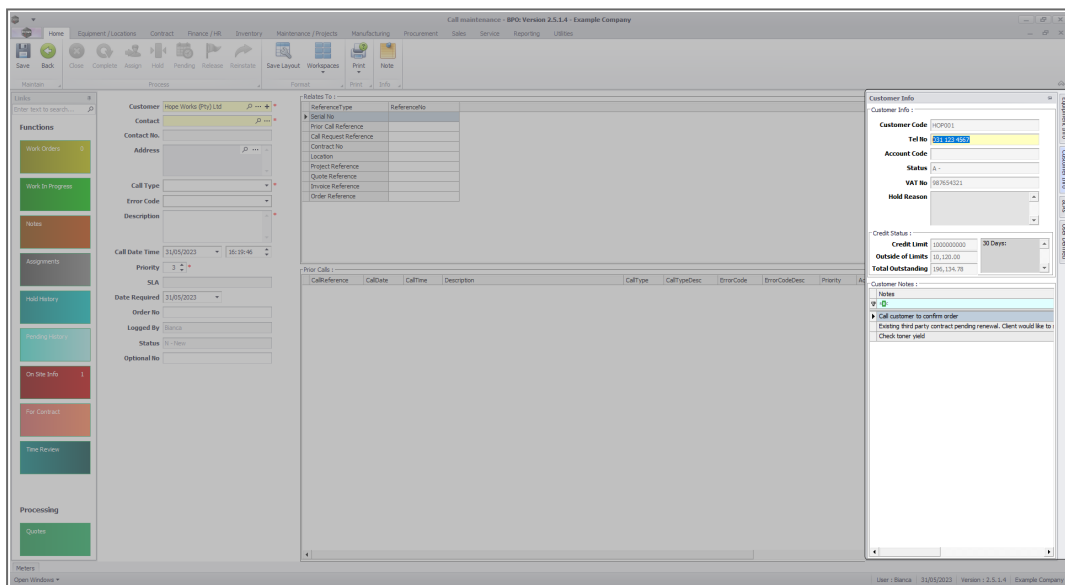


Select Customer:

- Click on the **row** of the **customer** you wish to **log a call** for.
- Click on **OK**.



- The **Customer Info** docking panel will **expand** to display view only details for the selected customer. This is helpful for customer and credit status checks, as well as any prior call notes.
- When done, click anywhere outside this dock panel to hide it.



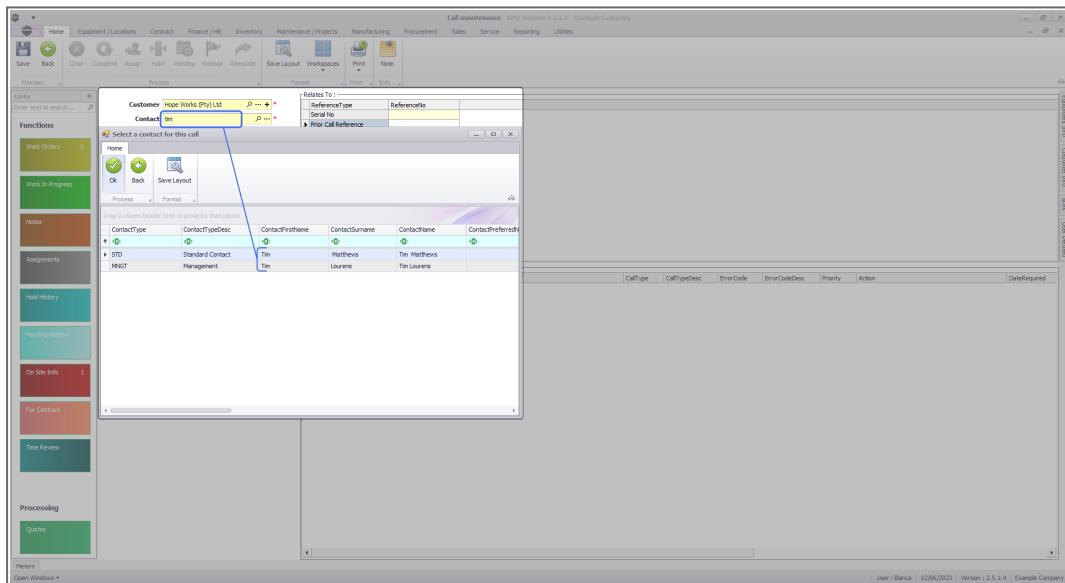
Contact: Search for and select the contact:

- The yellow colouring of the field indicates that you can search for the customer, using one of two methods.



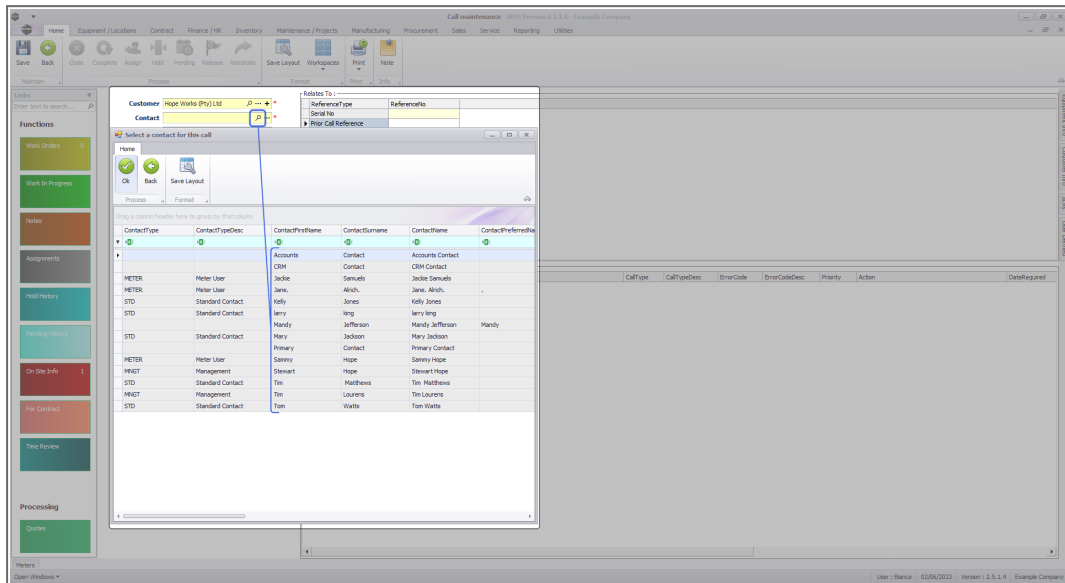
Search Method 1:

- Type in a part of the Contact Name in the Contact field and press Enter.
- The example has "Tim" typed in the field. When pressing Enter, the system will locate all the Contacts that has "Tim" as part of the name.
 - If the system locates the Contact, then the field will be populated with the contact name.
 - If more than one Contact exists, then the Select a contact for this call screen will display a list of the Contact's that have "Tim" forming a part of the name.
 - Skip to [Select Contact](#) below.



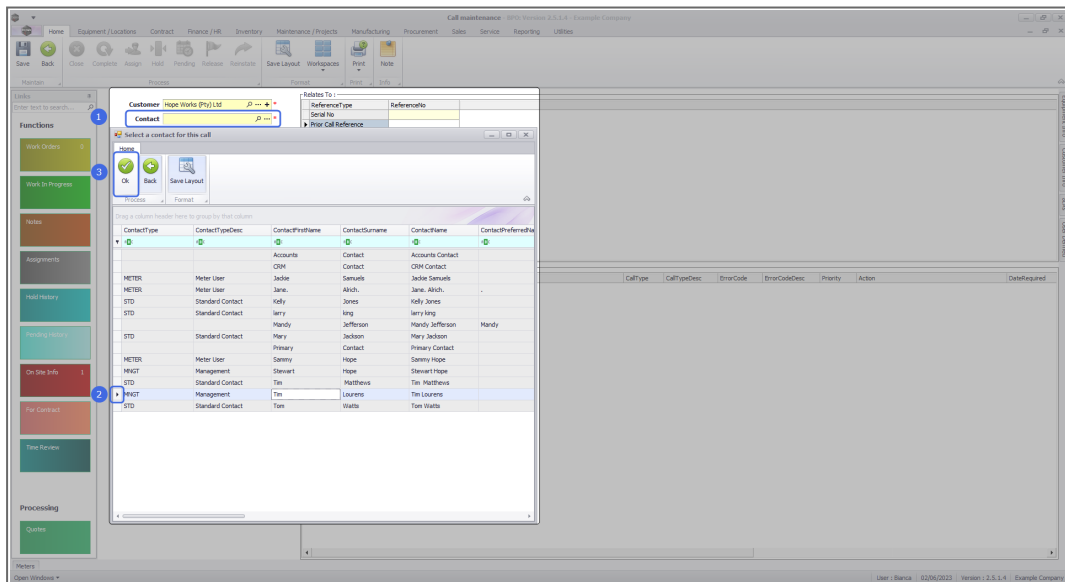
Search Method 2:

- Click on the search button in the contact field.
- The Select a contact for this call screen will display, listing all Active Contacts for the Customer previously selected.



Select Contact:

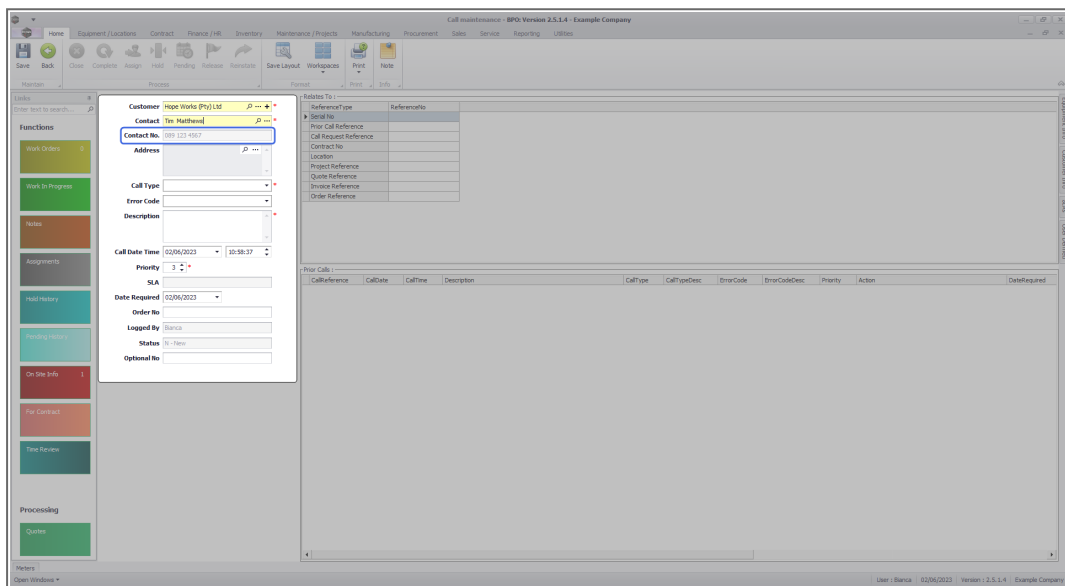
- Click on the row of the contact you wish to link to the call.
- Click on OK.



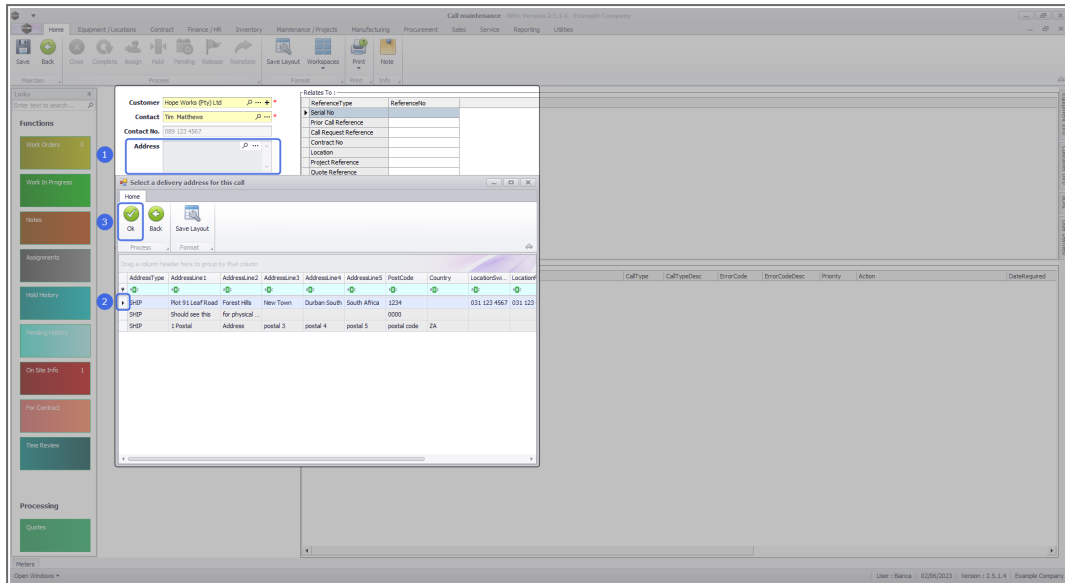


If you have searched for the contact person, and they do not appear on the list, then you can **add** a new contact from the **Call Maintenance** screen. This contact should be added as a **Standard Contact**. Refer to [Calls - Add New Contact](#).

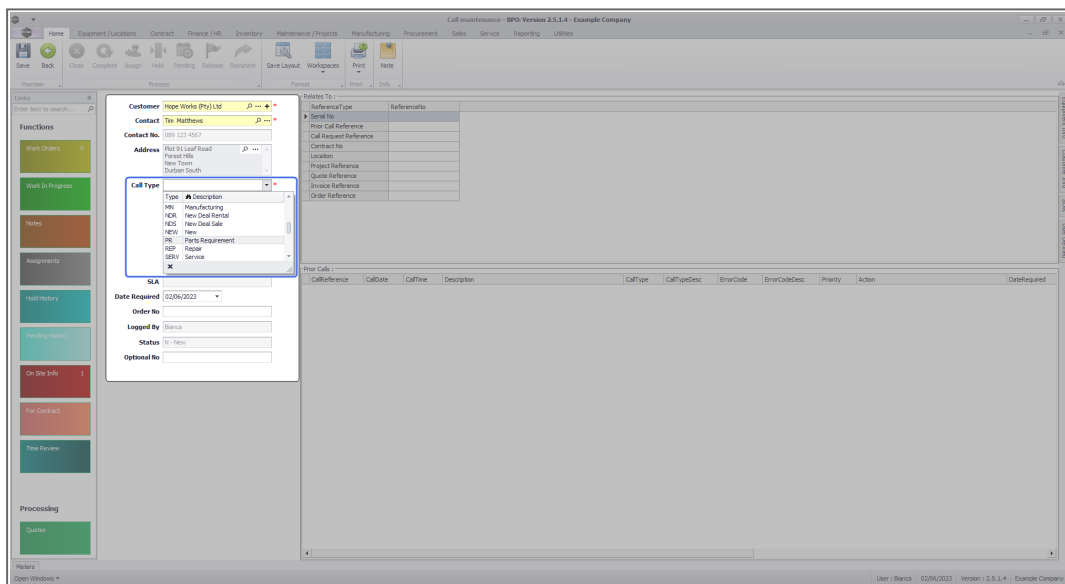
- **Contact No:** When the contact is selected, this field is auto populated with the contact's telephone number if configured on the contact.



- **Address:** Search for and select the address.

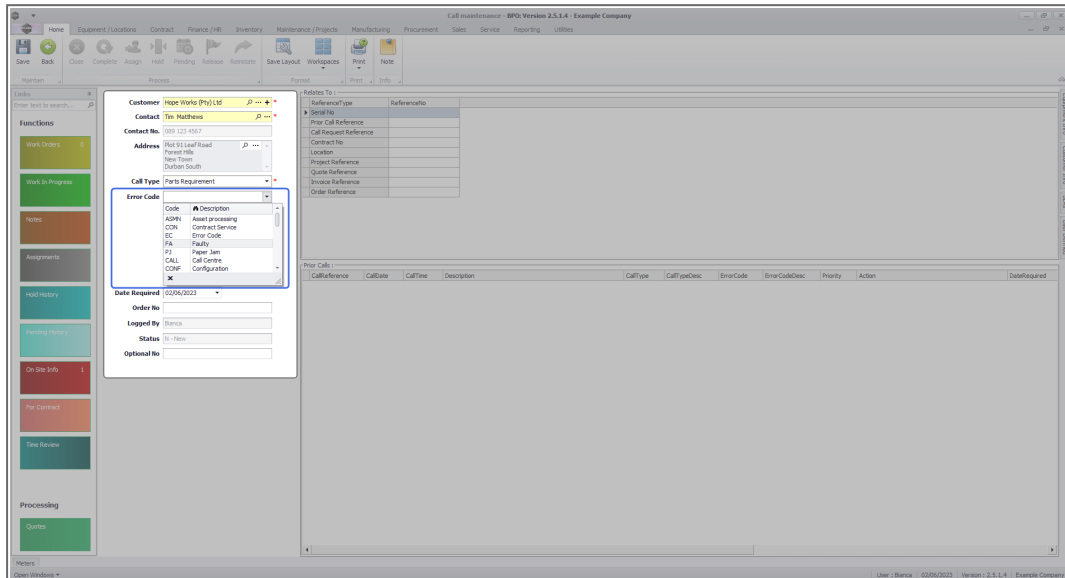


- **Call Type:** Select the required call type from the drop down list. (Refer to [Static Data - Call Types](#) if the call type required has not yet been configured.)



- **Error Code:** Click on the down arrow to display the error code list.

- Select the **error code type** as quoted by the customer. This field is not a mandatory field and may not be set up, depending on system requirements. (Refer to [Static Data - Call Error Codes](#) for setting up error codes if not configured.)



The screenshot displays the 'Log a Call' form in the CO3 Technologies software. The form is divided into several sections. The top section contains fields for Customer (Hippo Works Pty Ltd), Contact (Tim Matthews), and Address (Plot 10 Leaf Road, Forest Hill, New Town, Outback South). Below this is the 'Call Type' dropdown, which is currently set to 'Parts Requirement'. The 'Error Code' dropdown is highlighted, showing a list of error codes and their descriptions: ADPM (Asset processing), CON (Contract Service), EC (Error Code), FA (Faulty), FI (Paper Jam), CALL (Call Centre), and CONF (Configuration). The 'Date Required' field is set to 02/08/2023. Other fields include Order No, Logged By (Bence), Status (N - New), and Optional No. The bottom section of the form contains a table for 'Prior Calls' with columns for CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, ErrorCode, ErrorCodeDesc, Priority, Action, and DateRequired.

- **Description:** Click in the text box to type in a description for the work required.
- **Call Date Time:** This field will display the current date and time by default, and should not be changed.
- **Priority¹:** Click in the field to type in or use the arrow indicators to select the call priority.
- **SLA:²** This field cannot be updated, as the service level agreement information will populate for the customer.

¹1 = Most Important 5 = Least Important

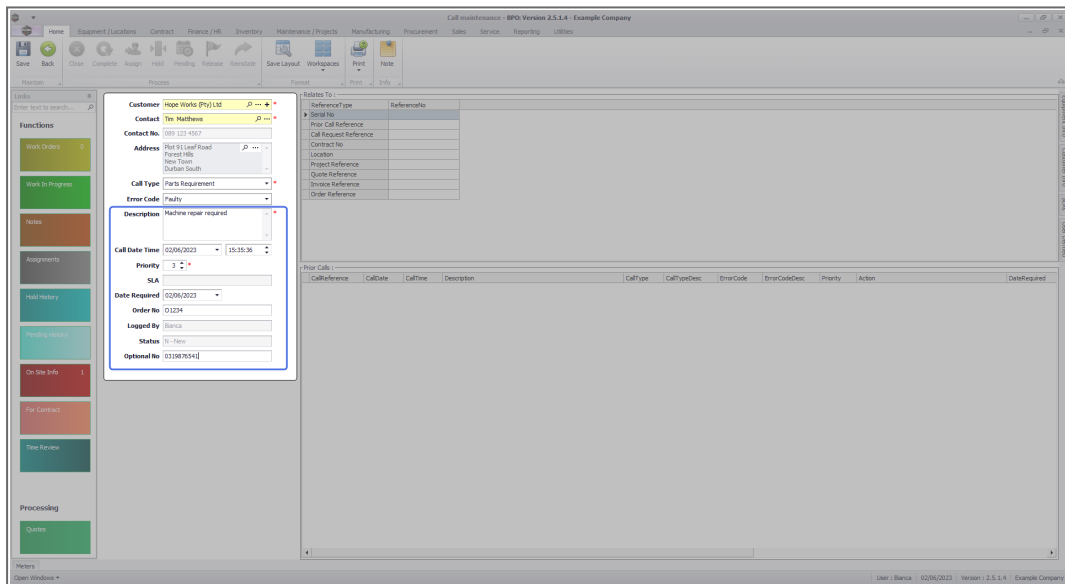
²This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).

- **Date Required:** The date will default to the current date. Click to type in or use the down **arrow** to select an alternative date using the calendar function.
- **Order No:** Type in the Purchase Order number raised by the customer, if required.



Note that this field could be mandatory based on the customer contract configuration i.e. if it is specified in the contract to include the Order Number then this will become a mandatory field for that particular customer.

- **Logged By:** This field will be populated with the name of the person currently logging the call.
- **Status:** The call status field will be set to **N - New** by default.
- **Optional No:** This field can be used for an additional reference number that the customer may wish to keep on record.



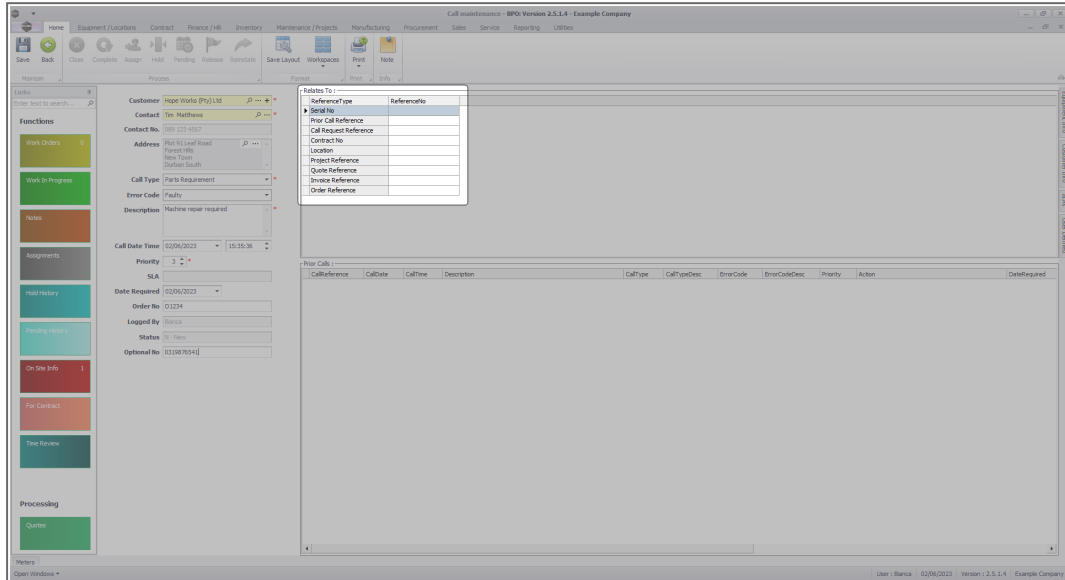
The screenshot displays the 'Log a Call' interface in the CO3 BPO Version 2.5.1.4 software. The form is divided into several sections:

- Customer Information:** Includes fields for Customer (Hops Works Pty Ltd), Contact (Tim Matthews), Contact No. (083 323 4567), Address (Plot 51 Level Road, Forest Hill, New Town, Quater South), Call Type (Parts Requirement), Error Code (Faulty), and Description (Machine repair required).
- Call Details:** Includes Call Date Time (02/06/2023), Priority (3), Date Required (02/06/2023), Order No (01234), Logged By (Blanca), Status (N - New), and Optional No (0310970541).
- References Table:** A table with columns for Reference Type and Reference No. It lists various references such as Serial No, Prior Call Reference, Call Request Reference, Contract No, Location, Project Reference, Quote Reference, Invoice Reference, and Order Reference.
- Prior Calls Table:** A table with columns for Call Reference, Call Date, Call Time, Description, Call Type, Call Type Desc, Error Code, Error Code Desc, Priority, Action, and Date Required.

The interface also features a sidebar on the left with navigation buttons and a top menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities.

RELATED REFERENCES

The **Related To** frame holds related references, such as the Serial Number or Location, originating Call Request Number, Contract Number, etc.



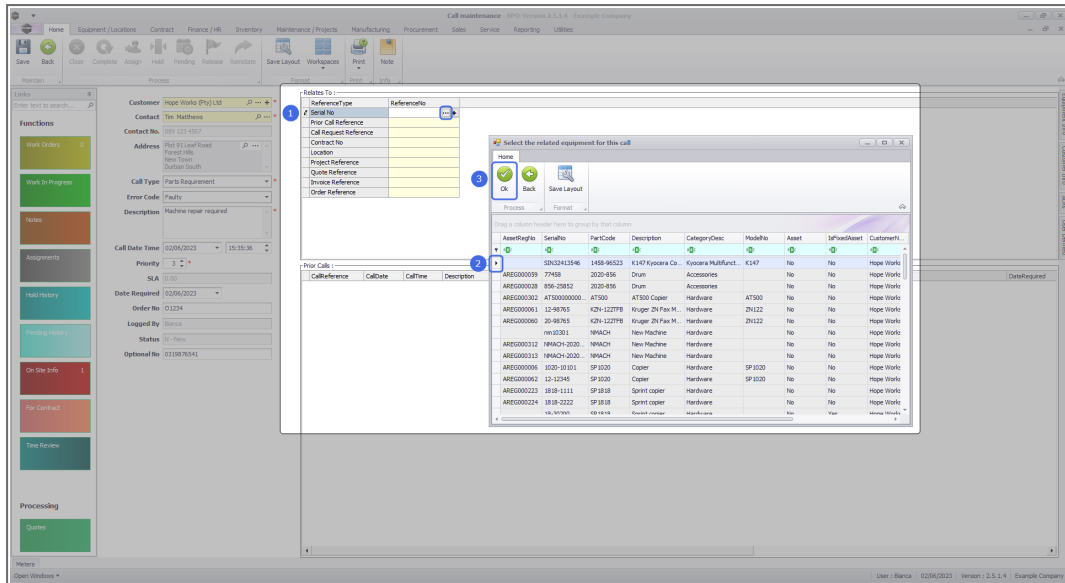
For Standard call log processing, we will select either a [Serial Number](#) or [Location](#).

Serial Number

- Click in the **Serial No.** field to display the **ellipsis** button.
- Click on the ellipsis button and select the serial number you wish to log the call against.
- Click on **OK**.

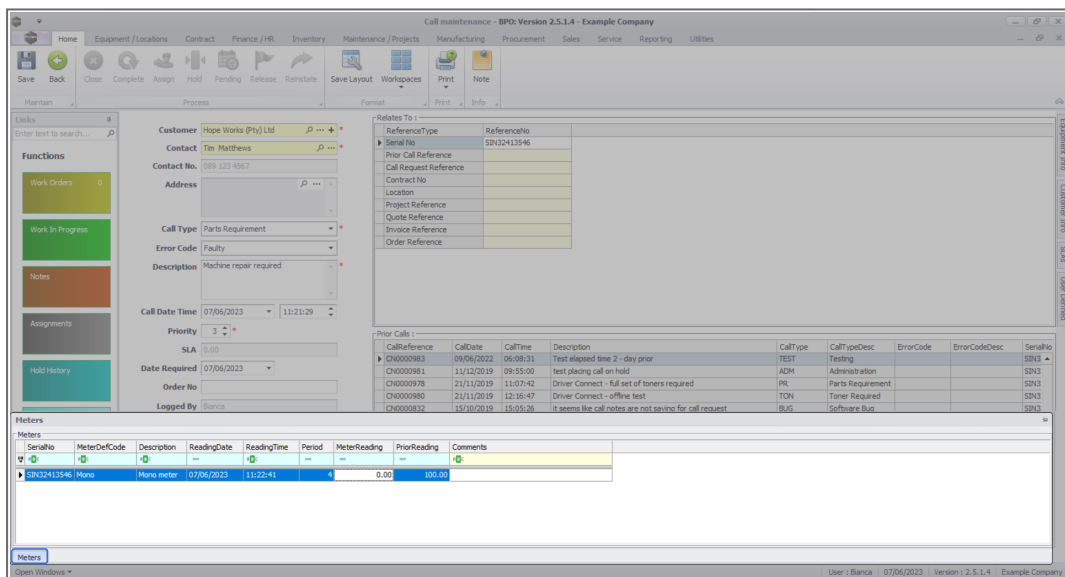


Note that as you have selected the customer first, the equipment list will be limited to the machines linked to the customer.



Meters

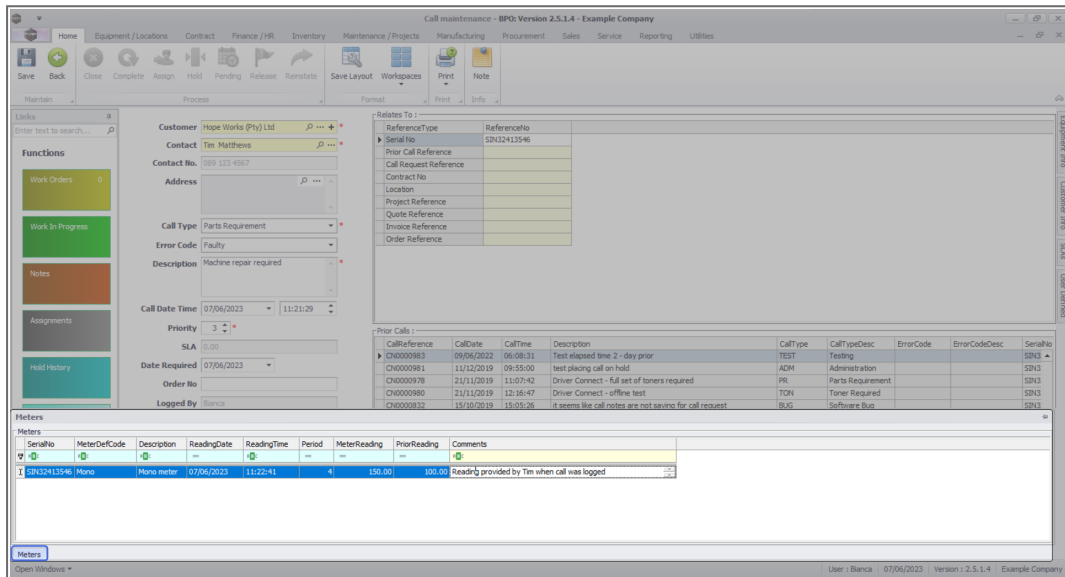
- If the asset has meters linked, then the Meters frame will automatically expand to display the Meter reading data grid.



- 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.



Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: Hope Works (Pty) Ltd
Contact: Tim Matthews
Address: 089 123 4567
Call Type: Parts Requirement
Error Code: Faulty
Description: Machine repair required
Call Date Time: 07/06/2023 11:21:29
Priority: 3
SLA: 0.00
Date Required: 07/06/2023
Order No:
Logged By: Bianca

Related To:

ReferenceType	ReferenceNo
Serial No	SN32413546
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

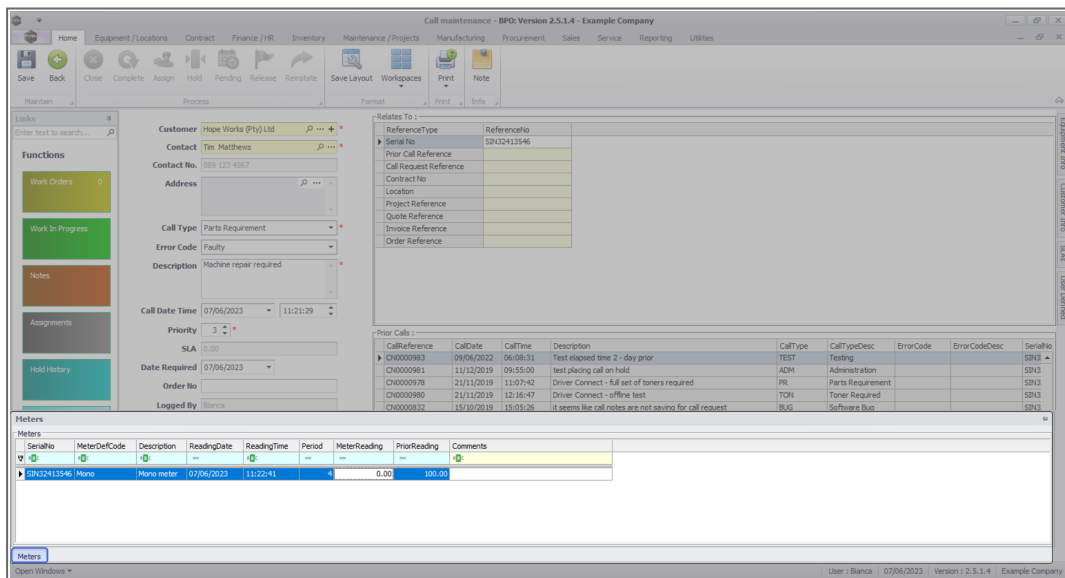
Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN3
CH0000981	11/12/2019	09:55:00	test placing call on hold	ADM	Administration			SN3
CH0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SN3
CH0000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SN3
CH0000932	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SN3

Meters:

SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReading	PriorReading	Comments
SN32413546	Mono	Mono meter	07/06/2023	11:22:41	4	100.00	100.00	Reading provided by Tim when call was logged

User : Bianca 07/06/2023 Version : 2.5.1.4 Example Company



Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: Hope Works (Pty) Ltd
Contact: Tim Matthews
Address: 089 123 4567
Call Type: Parts Requirement
Error Code: Faulty
Description: Machine repair required
Call Date Time: 07/06/2023 11:21:29
Priority: 3
SLA: 0.00
Date Required: 07/06/2023
Order No:
Logged By: Bianca

Related To:

ReferenceType	ReferenceNo
Serial No	SN32413546
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls:

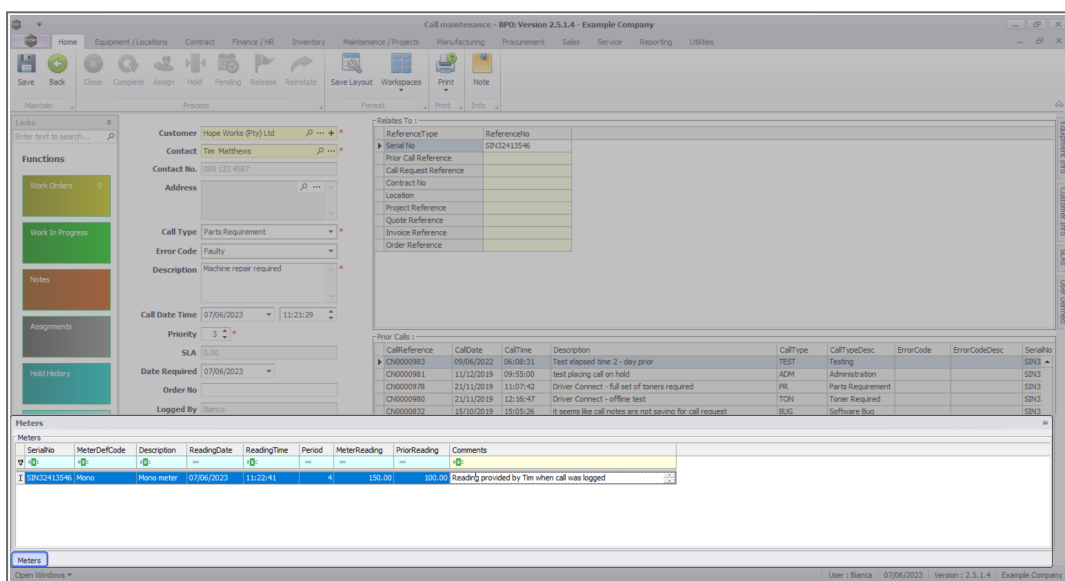
CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN3
CH0000981	11/12/2019	09:55:00	test placing call on hold	ADM	Administration			SN3
CH0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SN3
CH0000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SN3
CH0000932	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SN3

Meters:

SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReading	PriorReading	Comments
SN32413546	Mono	Mono meter	07/06/2023	11:22:41	4	0.00	100.00	

User : Bianca 07/06/2023 Version : 2.5.1.4 Example 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.



The screenshot displays the 'Log a Call' form in the CO3 Technologies software. The form is divided into several sections:

- Customer Information:** Includes fields for Customer (Hope Works (Pty) Ltd), Contact (Tim Matthews), Contact No. (089 123 4567), Address, Call Type (Parts Requirement), Error Code (Faulty), Description (Machine repair required), Call Date Time (07/06/2023), Priority (3), SLA (0.00), Date Required (07/06/2023), Order No, and Logged By (Blanca).
- Reference Type:** A dropdown menu with options like Serial No, Prior Call Reference, Call Request Reference, Contract No, Location, Project Reference, Quote Reference, Invoice Reference, and Order Reference.
- Prior Calls:** A table listing previous calls with columns for CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, ErrorCode, ErrorDesc, and SerialNo.
- Meters:** A section for recording meter readings with a table containing columns for SerialNo, MeterDefCode, Description, ReadingDate, ReadingTime, Period, MeterReading, PriorReading, and Comments.

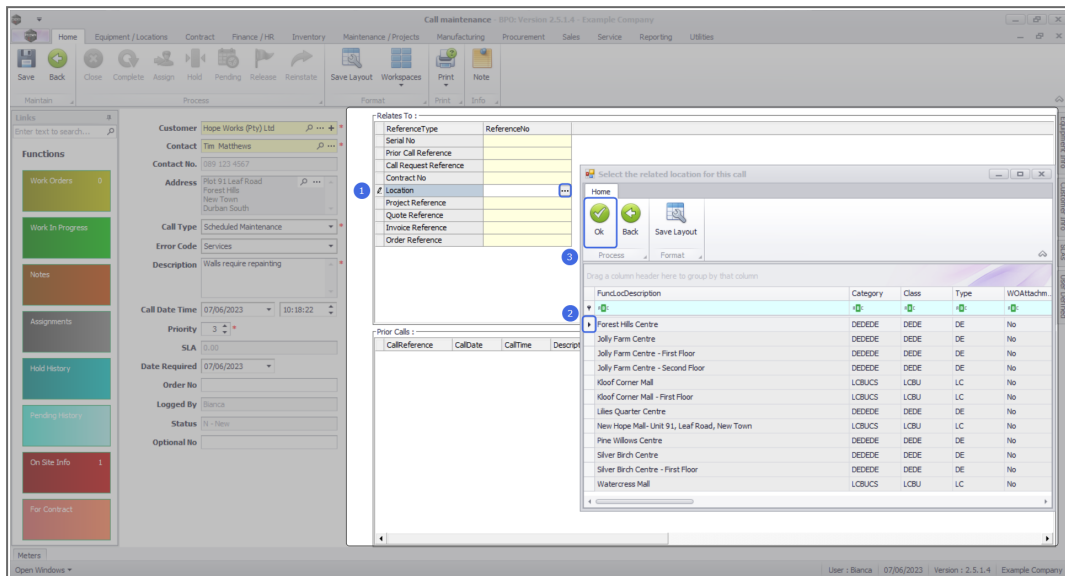
- Jump ahead to [Contract Number](#).

Location

- Click in the **Location** field to display the **ellipsis** button.
- Click on the ellipsis button and select the Location you wish to log the call against.
- Click on **OK**.

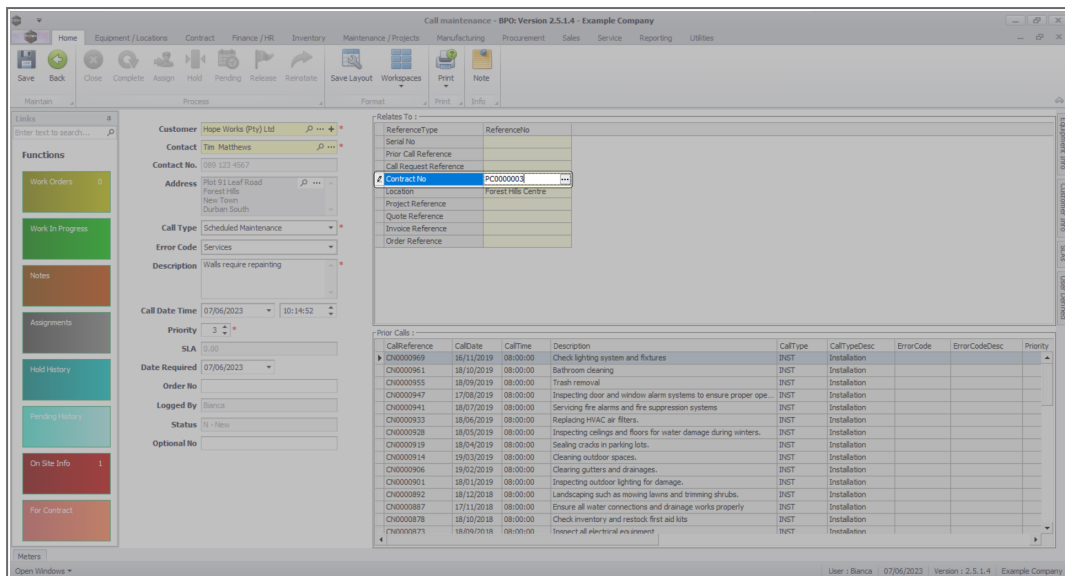


Note that as you have selected the customer first, the location list will be limited to the locations linked to the customer.



Contract Number

- If the Serial Number or Location you have selected is on contract, then the contract number field will auto populate with the contract number.



Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: Hope Works (Pty) Ltd
 Contact: Tim Matthews
 Address: Plot 91 Leaf Road, Forest Hills, New Town, Durban South
 Call Type: Scheduled Maintenance
 Error Code: Services
 Description: Walls require repainting
 Call Date Time: 07/06/2023 10:14:52
 Priority: 3
 Date Required: 07/06/2023
 Order No:
 Logged By: Bianca
 Status: New
 Optional No:

Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Priority
CH0000989	18/11/2019	08:00:00	Check lighting system and fixtures	INST	Installation			
CH0000961	18/10/2019	08:00:00	Bathroom cleaning	INST	Installation			
CH0000955	18/09/2019	08:00:00	Trash removal	INST	Installation			
CH0000947	17/08/2019	08:00:00	Inspecting door and window alarm systems to ensure proper op	INST	Installation			
CH0000941	18/07/2019	08:00:00	Servicing fire alarms and fire suppression systems	INST	Installation			
CH0000933	18/06/2019	08:00:00	Replacing HVAC air filters	INST	Installation			
CH0000928	18/05/2019	08:00:00	Inspecting ceilings and floors for water damage during winters	INST	Installation			
CH0000919	18/04/2019	08:00:00	Sealing cracks in parking lots	INST	Installation			
CH0000914	19/03/2019	08:00:00	Cleaning outdoor spaces	INST	Installation			
CH0000906	19/02/2019	08:00:00	Cleaning gutters and drainages	INST	Installation			
CH0000901	18/01/2019	08:00:00	Inspecting outdoor lighting for damage	INST	Installation			
CH0000892	18/12/2018	08:00:00	Landscaping such as mowing lawns and trimming shrubs	INST	Installation			
CH0000887	17/11/2018	08:00:00	Ensure all water connections and drainage works properly	INST	Installation			
CH0000878	18/10/2018	08:00:00	Check inventory and restock first aid kits	INST	Installation			
CH0000873	18/09/2018	08:00:00	Inspect all electrical equipment	INST	Installation			

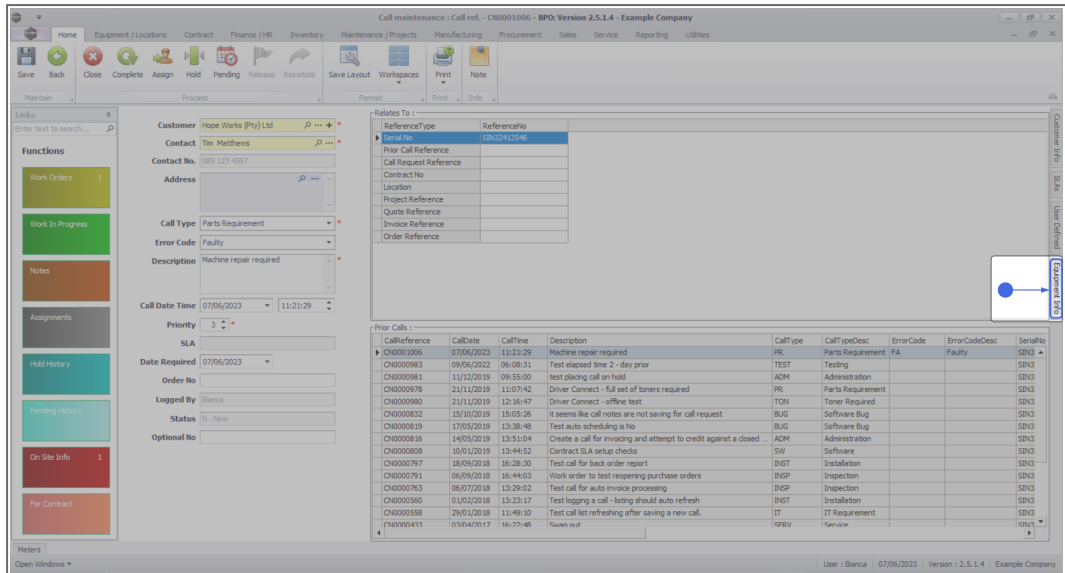
The Call maintain screen has a lot of helpful information that can be viewed when logging the call or after the call has been saved.

You can skip ahead to [Adding the Call Note](#) or [Saving the Call](#).

EQUIPMENT INFO

The Equipment Information dock panel will only contain information where a **Serial Number** is linked to the call, as this information is related to the associated part number.

- Click on the Equipment Info tab.



Call maintenance : Call ref. - CH0001006 - BPO: Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reroute Save Layout Workspaces Print Note

Links: Enter text to search...

Functions: Work Orders, Work In Progress, Notes, Assignments, Hold History, Pending History, On Site Info, For Contract

Customer: Hope Works (Pty) Ltd

Contact: Tim Matthews

Contact No: 099 123 4567

Address:

Call Type: Parts Requirement

Error Code: Faulty

Description: Machine repair required

Call Date Time: 07/06/2023 11:21:29

Priority: 3

SLA:

Date Required: 07/06/2023

Order No:

Logged By: Bianca

Status: New

Optional No:

Relates To:

ReferenceType	ReferenceNo
Serial No	CH0001006
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

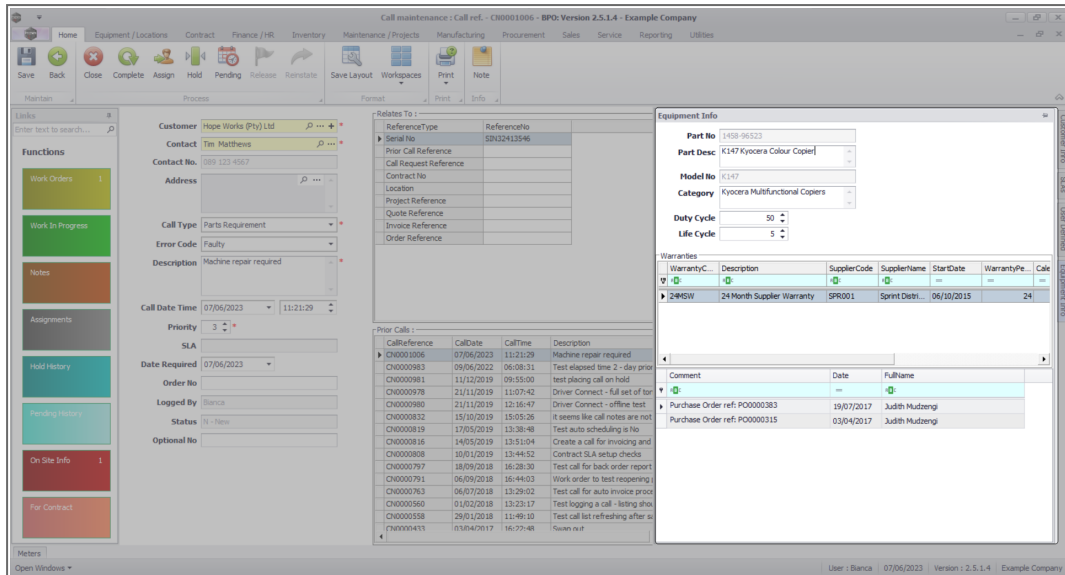
Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0001006	07/06/2023	11:21:29	Machine repair required	PR	Parts Requirement	FA	Faulty	SIN3
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN3
CH0000981	11/12/2019	09:55:00	test placing call on hold	ACM	Administration			SIN3
CH0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SIN3
CH0000980	21/11/2019	12:16:47	Driver Connect - offline test	TCN	Toner Required			SIN3
CH0000932	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SIN3
CH0000919	17/05/2019	13:38:48	Test auto scheduling is No	BUG	Software Bug			SIN3
CH0000816	14/05/2019	13:51:04	Create a call for invoicing and attempt to credit against a closed	ACM	Administration			SIN3
CH0000808	30/01/2019	13:44:52	Contract SLA setup checks	SW	Software			SIN3
CH0000797	18/09/2018	16:28:30	Test call for back order report	INST	Installation			SIN3
CH0000791	06/09/2018	16:44:03	Work order to test resending purchase orders	INSP	Inspection			SIN3
CH0000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SIN3
CH0000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SIN3
CH0000558	29/01/2018	11:49:10	Test call list refreshing after saving a new call.	IT	IT Requirement			SIN3
CH0000433	01/04/2017	16:25:48	Swan out	SRV	Service			SIN3

Meters: Open Windows

User: Bianca 07/06/2023 Version: 2.5.1.4 Example Company

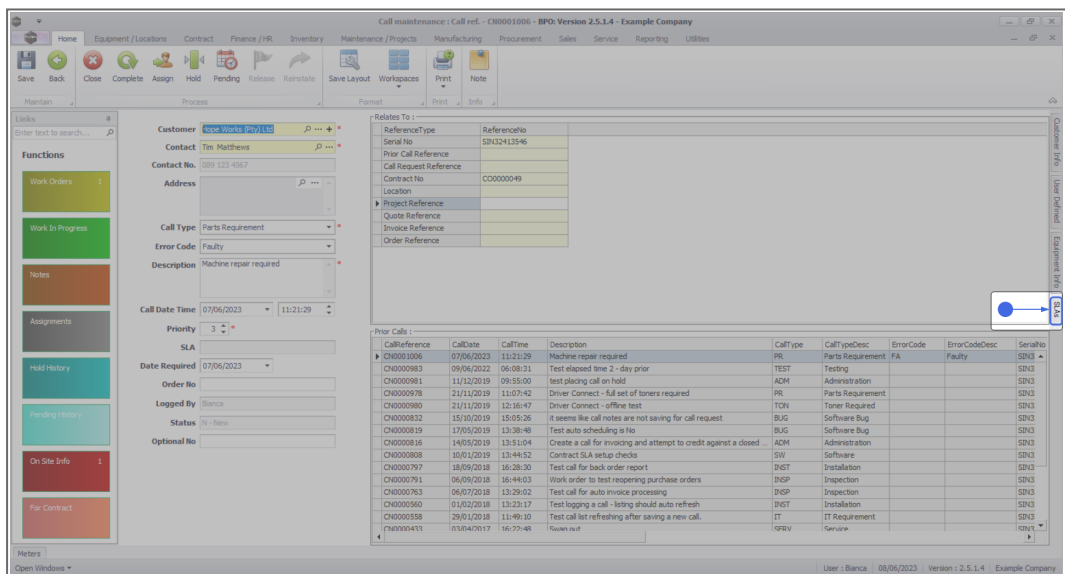
- The Equipment Info dock panel will open, displaying useful information related to the **serial number** and its **part number**:
 - Part No, Part Description, Model Number, Category, Duty Cycle and Life Cycle information related to the Part Number.
 - Warranties - will list any warranties assigned to the Serial Number.
 - Purchase Orders - ?



SLAs

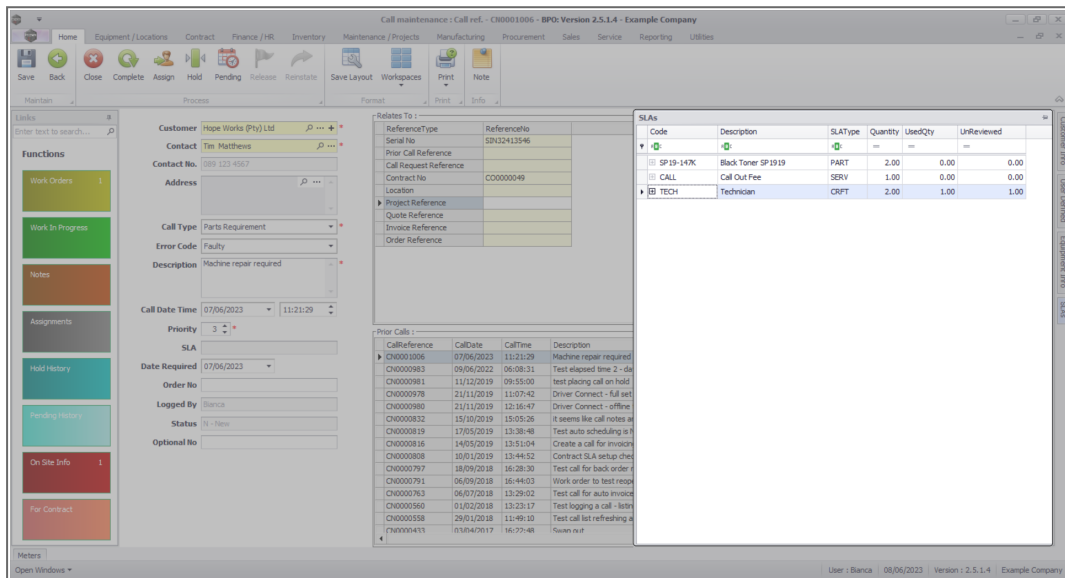
If the Item is on contract any SLA Contract Inclusion Items will display in this list.

- Click on the SLAs tab.

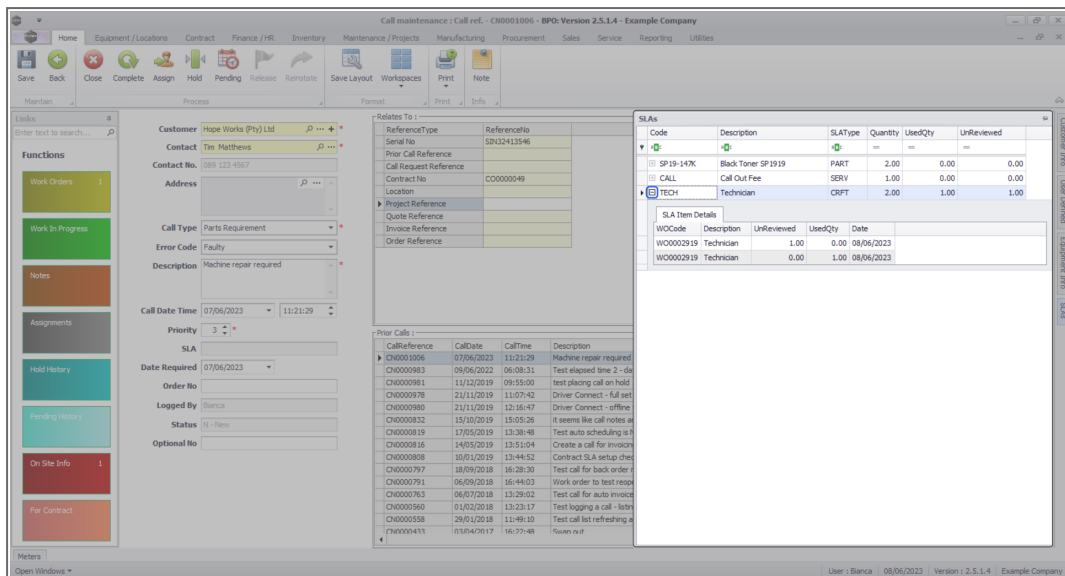


- The SLAs dock panel will open displaying the SLA Items as well as the quantity included.

For Labour Time, you will be able to see how many hours are included versus how many hours have been used. If Time Review is used, you can also see time logged that has not yet been reviewed as under SLA.



- Click on the expand data grid button to view the SLA Item Details
- This will show you a record of the items logged under SLA



Customer: Hope Works (Pty) Ltd
Contact: Tim Matthews
Contact No: 089 123 4567
Address:
Call Type: Parts Requirement
Error Code: Faulty
Description: Machine repair required
Call Date Time: 07/06/2023 11:21:29
Priority: 3
Date Required: 07/06/2023
Order No:
Logged By: Bianca
Status: New
Optional No:

Prior Calls:

CallReference	CallDate	CallTime	Description
CH0001006	07/06/2023	11:21:29	Machine repair required
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - de
CH0000981	11/12/2019	09:18:00	Test placing call on hold
CH0000978	21/11/2019	11:07:42	Driver Connect - full act
CH0000980	21/11/2019	12:16:47	Driver Connect - offline
CH0000832	15/10/2019	15:05:26	it seems like call notes ar
CH0000819	17/05/2019	13:30:48	Test auto scheduling is r
CH0000816	14/05/2019	13:51:04	Create a call for invoice
CH0000808	10/01/2019	13:44:52	Contract SLA setup che
CH0000797	18/09/2018	16:28:30	Test call for back order
CH0000791	06/09/2018	16:44:03	Work order to test resp
CH0000763	06/07/2018	13:29:02	Test call for auto invoice
CH0000560	01/02/2018	13:23:17	Test logging a call - test
CH0000558	29/01/2018	11:49:10	Test call list refreshing a
CH0000433	03/04/2017	16:22:48	Test call list refreshing a

SLAs:

Code	Description	SLAType	Quantity	UsedQty	UnReviewed
SP19-147K	Black Toner SP1919	PART	2.00	0.00	0.00
CALL	Call Out Fee	SERV	1.00	0.00	0.00
TECH	Technician	CRFT	2.00	1.00	1.00

SLA Item Details:

WOCCode	Description	UnReviewed	UsedQty	Date
WO0002919	Technician	1.00	0.00	08/06/2023
WO0002919	Technician	0.00	1.00	08/06/2023

User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

- Click on the **User Defined** dock panel tab to open the panel.

¹ BPO2 v2.5.0.8 or higher. " **Add Interest Rate** " on page 3

- Any custom fields configured and updated for the related **Customer**, **Asset** or **Location** and /or Contract linked to this call will display in the User Defined field panel.

Code	CodeDescription	VariableValue
ASMN_CODE01	Asset UDF Free Input Text Example	
ASMN_CODE02	Asset UDF Lookup List Example	
ASMN_CODE03	Asset UDF Yes No Example	

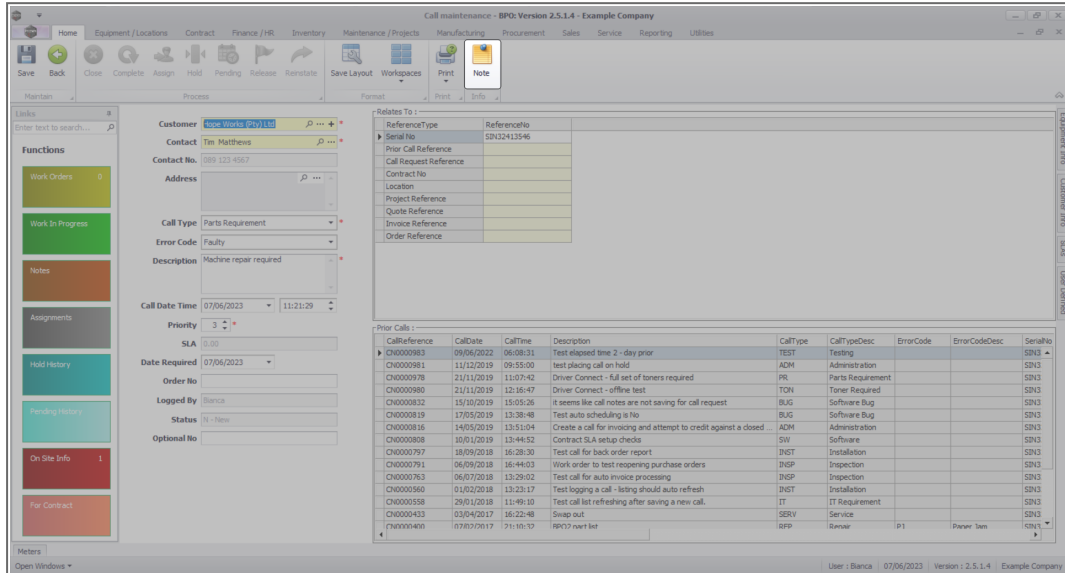
Code	CodeDescription	VariableValue
CTRT_CODE01	Contract UDF Free Input Text Example	
CTRT_CODE02	Contract UDF Lookup List Example	
CTRT_CODE03	Contract UDF Yes No Example	

Code	CodeDescription	VariableValue
CUST_CODE01	Customer UDF Free Input Text Example	
CUST_CODE02	Customer UDF Lookup List Example	
CUST_CODE03	Customer UDF Yes No Example	

Code	CodeDescription	VariableValue
FNLC_CODE01	Location UDF Free Input Text Example	
FNLC_CODE02	Location UDF Lookup List Example	
FNLC_CODE03	Location UDF Yes No Example	

Add Call Note

- A Call Note can be added directly from the Call Maintain screen by clicking on **Note**.



CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo
CH0000983	09/06/2022	06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN43
CH0000981	11/12/2019	09:55:00	test placing call on hold	ADM	Administration			SN43
CH0000978	21/11/2019	11:07:42	Driver Connect - full set of toners required	PR	Parts Requirement			SN43
CH0000980	21/11/2019	12:16:47	Driver Connect - offline test	TON	Toner Required			SN43
CH0000832	15/10/2019	15:05:26	it seems like call notes are not saving for call request	BUG	Software Bug			SN43
CH0000819	17/05/2019	13:38:48	Test auto scheduling is no	BUG	Software Bug			SN43
CH0000816	14/05/2019	13:51:04	Create a call for invoicing and attempt to credit against a closed	ADM	Administration			SN43
CH0000808	10/01/2019	13:44:52	Contract SLA setup checks	SW	Software			SN43
CH0000797	18/09/2018	16:28:30	Test call for back order report	INST	Installation			SN43
CH0000791	06/09/2018	16:44:03	Work order to test respawning purchase orders	INSP	Inspection			SN43
CH0000763	06/07/2018	13:29:02	Test call for auto invoice processing	INSP	Inspection			SN43
CH0000560	01/02/2018	13:23:17	Test logging a call - listing should auto refresh	INST	Installation			SN43
CH0000558	29/01/2018	11:49:10	Test call list refreshing after saving a new call.	IT	IT Requirement			SN43
CH0000433	03/04/2017	16:22:48	Swap out	SERV	Service			SN43
CH0000400	07/02/2017	21:10:17	RP17 next test	INSP	Inspection	P1	Power Item	SN43

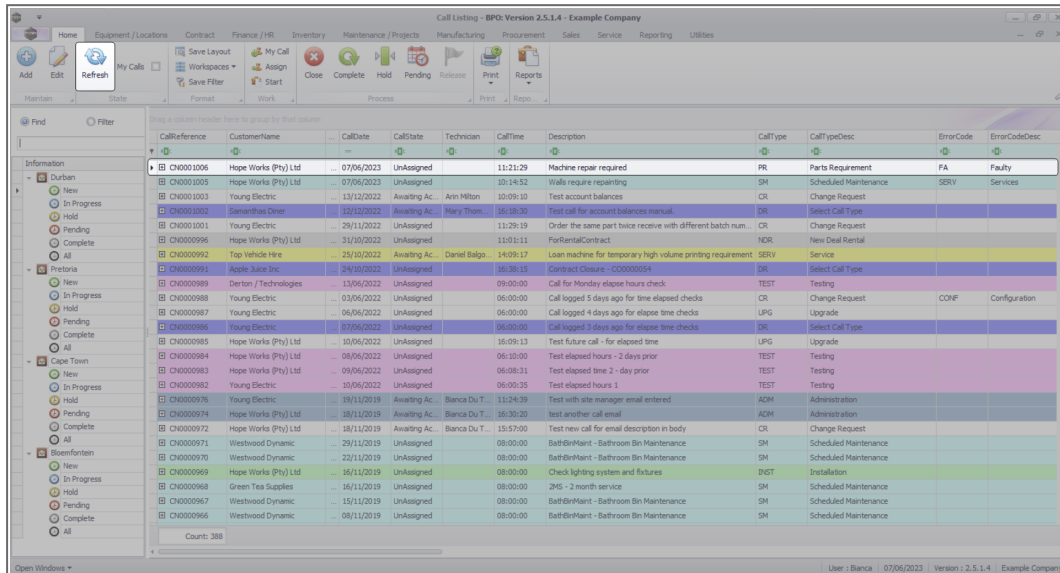
- The **New Note** frame will be displayed.
- Click in the text area to type the customer note and click on **Close** when done.
- The Note will be saved as a Call Note when the call is saved.

- Refer to **Calls - Notes** to view a list of all the notes created for the Call.

SAVE THE CALL

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

- You will return to the **Call Listing** screen where you can **view** the new **call log**.
- If the new call log is not immediately apparent in the Call Listing screen, then click on **Refresh**.

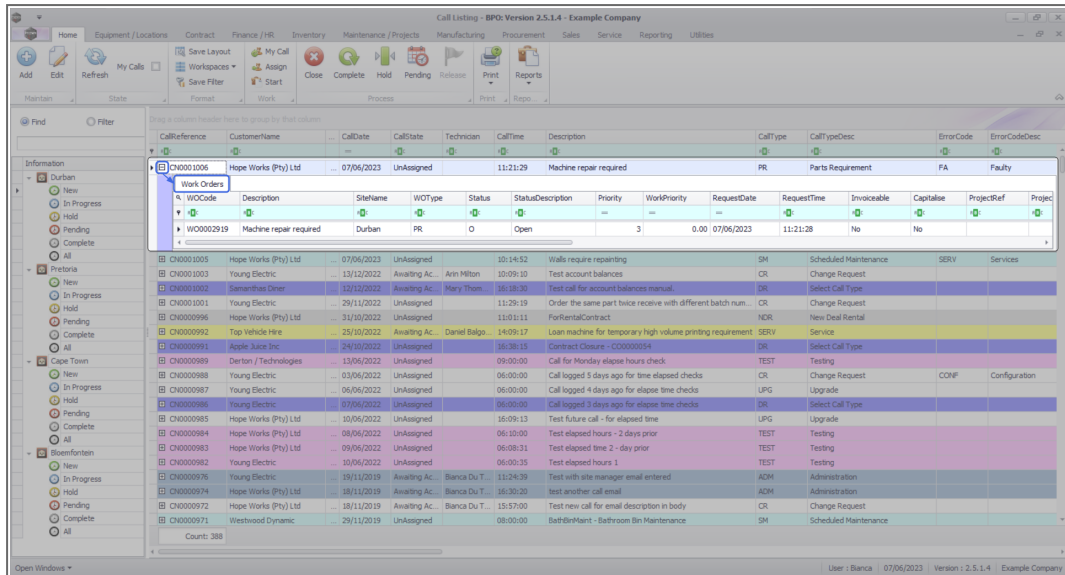


CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc
CH0001006	Hope Works (Pty) Ltd	07/06/2023	Unassigned		11:21:29	Machine repair required	PR	Parts Requirement	FA	Faulty
CH0001005	Hope Works (Pty) Ltd	07/06/2023	Unassigned		10:14:52	Walls require repainting	SM	Scheduled Maintenance	SERV	Services
CH0001003	Young Electric	13/12/2022	Awaiting Ac.	Amin Milton	10:09:10	Test account balances	CR	Change Request		
CH0001002	Samantha Denier	12/12/2022	Awaiting Ac.	Mary Thom	10:18:10	Test call for account balances manual	DR	Select Call Type		
CH0001001	Young Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num...	CR	Change Request		
CH0000999	Hope Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	For Rental Contract	NCR	New Deal Rental		
CH0000992	Top Vehicle Hire	25/10/2022	Awaiting Ac.	Daniel Balgo	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service		
CH0000991	Ashe Jalel Ben	24/10/2022	Unassigned		06:36:15	Contract Closure - COB0000054	SM	Select Call Type		
CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing		
CH0000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration
CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade		
CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type		
CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade		
CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing		
CH0000983	Hope Works (Pty) Ltd	09/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing		
CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing		
CH0000976	Young Electric	19/11/2019	Awaiting Ac.	Blanca Du T.	11:24:39	Test with site manager email entered	ADM	Administration		
CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Ac.	Blanca Du T.	06:36:28	Test another call email	ADM	Administration		
CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Ac.	Blanca Du T.	15:17:00	Test new call for email description in body	CR	Change Request		
CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	Bath/Bin/Hant - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Bath/Bin/Hant - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Check lighting system and fixtures	INST	Installation		
CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance		
CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Bath/Bin/Hant - Bathroom Bin Maintenance	SM	Scheduled Maintenance		
CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Bath/Bin/Hant - Bathroom Bin Maintenance	SM	Scheduled Maintenance		

VIEW WORK ORDER DETAILS

For standard call centre processing, the underlying Work Order is automatically created.

- From the **Call Listing** screen,
- Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
- The **Work Order data grid** will expand to display the generated **work order number** and all the information related to the call log.



You can also view the [call work order\(s\)](#) from the call maintain screen.

ADDITIONAL DETAIL SELECTION METHODS

As noted in the introduction text, using these detail selection methods can help speed up the call logging process.

LOG CALL FROM THE SERIAL NUMBER OR LOCATION

- In the **Relates To** frame, select either the **Serial No.** or the **Location**.
- The associated Customer and Customer details will auto populate, and if the item selected is on Contract, the Contract Number will also auto populate.

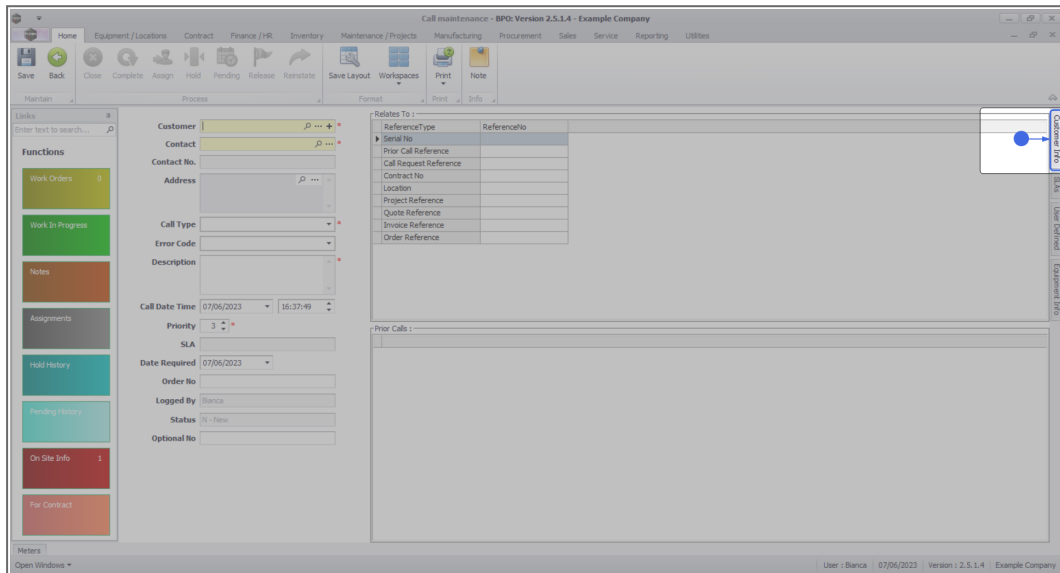
FIND CUSTOMER BY TEL NO

Alternatively, search for the customer by **Telephone Number**.

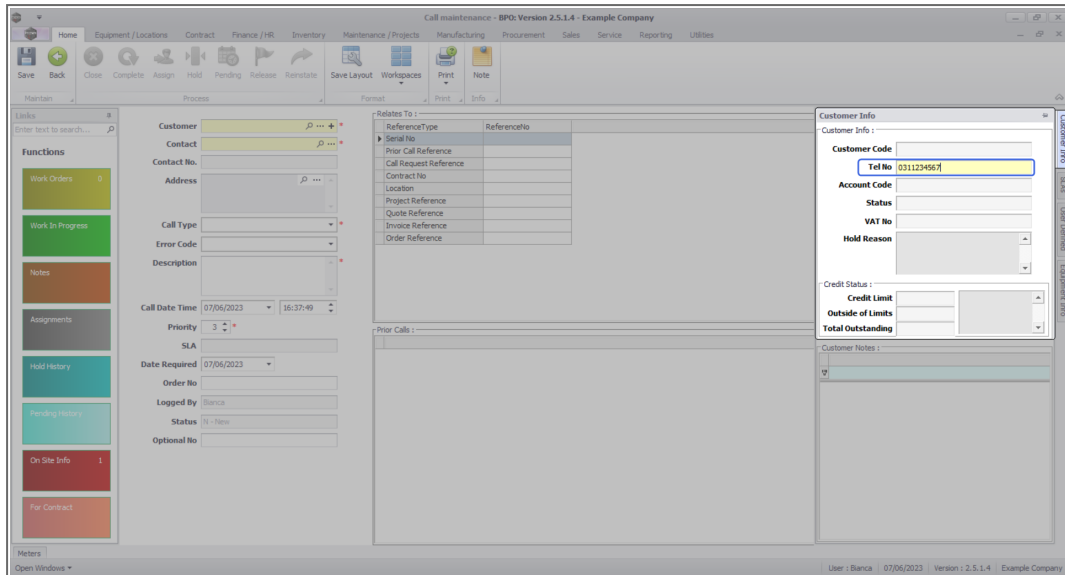


Note that the telephone number saved on the customer record, and the number you are searching for should not have any spaces.

- From the **Call maintenance** screen,
- Click on the **Customer Info** tab.



- In the Tel No field, type in the telephone number and press enter on your keyboard.
 - If the number matches a telephone number on a single Customer, the customer details will populate.
 - If a few customers have the same telephone number, a lookup will list display that you can select from.



- The associated Customer and Customer details will auto populate.

Related Topics

- [Introduction to Work Orders](#)
- [Calls - Add New Contact](#)
- [Calls - Edit Buttons](#)
- [Calls - Customers on Hold](#)

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