

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

SERVICE

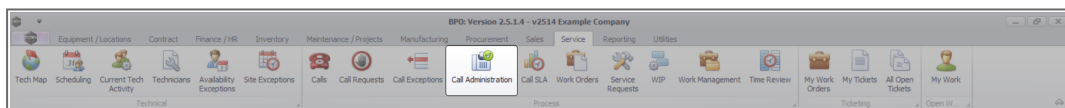
CALL ADMINISTRATION – CALL SALES QUOTES

The Call Administration screen is part of the Extended Call Centre - Version Compatibility¹

The **Quotes** tile is a quick way to navigate to the list of Quotes related to the selected call.

THE CALL ADMINISTRATION LISTING SCREEN

Ribbon Select **Service** > **Call Administration**



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

¹BPO2 v2.5.1.3 or higher.

- Click on the row selector of the call you would like to work with.

QUOTES

- Click on the **Quotes** tile.

Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

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

My Calls Workspaces Assign Close Complete Hold Pending Release Reroute Print Reports

State: Durban Refresh My Calls Workspaces Assign Close Complete Hold Pending Release Reroute Print Reports

Links: Enter text to search... On Site Info For Contract Time Review Quotes Orders Invoices Credit Notes

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0001036	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Belinda Sha	10:40:51	Copier service required.	SERV	Service			20
CH0001035	Hope Works (Pty) Ltd	12/12/2023	Unassigned		10:38:38	Paper keeps jamming.	REP	Repair			20
CH0001034	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Blanca Du T.	10:29:04	Full set of toners required.	TON	Toner Required			AT
CH0001033	Young Electric	05/12/2023	Unassigned		15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale			
CH0001032	Young Electric	02/12/2023	Unassigned		12:19:12	Test credit note on work order	MAN	Manufacturing			
CH0001031	Hope Works (Pty) Ltd	29/09/2023	Unassigned		12:56:41	New Deal created from order CH0000306	NDS	New Deal Sale			
CH0001024	Hope Works (Pty) Ltd	12/09/2023	Unassigned		09:23:50	Contract for Expiry Test	NDR	New Deal Rental			
CH0001023	Derton / Technologies	08/09/2023	Unassigned		10:52:25	Open warranty claims have not been processed.	INSP	Inspection			20
CH0001022	/ Technologies	08/09/2023	Unassigned		10:44:46	Meters attached with no readings captured	INCT	Installation			20
CH0001021	/ Technologies	07/09/2023	Unassigned		16:43:14	Call Exceptions - to correct but not flag.	INCT	Installation			20
CH0001020	Works (Pty) Ltd	05/09/2023	Awaiting Ac.	Blanca Du T.	15:56:53	Test call via functionality	SERV	Service			20
CH0001019	Juice Inc	22/08/2023	Unassigned		11:30:52	Contract Closure - CO0000086	TR	Training			
CH0001018	Copiers	22/08/2023	Unassigned		11:28:32	Contract Closure - CO0000041	DR	Select Call Type			
CH0001017	Electric	22/08/2023	Unassigned		11:28:26	Contract Closure - CO0000031	DR	Select Call Type			
CH0001016	g Shoes	22/08/2023	Unassigned		11:28:18	Contract Closure - CO0000001	DR	Select Call Type			
CH0001015	Young Electric	22/08/2023	Unassigned		11:27:49	Contract Closure - CO0000008	DR	Select Call Type			
CH0001014	Office Supplies Unlimited	22/08/2023	Unassigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type			
CH0001013	Apple Juice Inc	25/07/2023	Unassigned		10:18:33	Machine inspection required	INSP	Inspection			
CH0001012	Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac.	Blanca Du T.	11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	50
CH0001011	Hope Works (Pty) Ltd	07/06/2023	Unassigned		10:14:52	Walls require repainting	SM	Scheduled Maintenance	SERV	Services	
CH0001010	Young Electric	13/12/2022	Awaiting Ac.	Ann Milton	10:09:10	Test account balances	DR	Select Call Type			10
CH0001009	Samanthes Diner	12/12/2022	Awaiting Ac.	Mary Thom	16:18:30	Test call for account balances manual.	DR	Select Call Type			19
CH0001008	Young Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	PR	Parts Requirement			
CH0000996	Hope Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
CH0000991	Apple Juice Inc	24/10/2022	Unassigned		16:38:15	Contract Closure - CO0000054	ADM	Administration			

Count: 377

User : Blanca 15/01/2024 Version : 2.5.1.4 v2514Example Company

- The **Quotes** listing screen will open displaying the Quotes related to the selected call.

Sales Quotes for Call CH0001004 - BPO Version 2.5.1.4 - v2514 Example Company

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

Add Edit Delete View Back Forward Accepted Rejected Convert Order Clone Quote Print Export Save Layout Workspaces Durban Refresh

Navigation Process Print Format

Bring a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStat.	Status
QT0000288	DER001	Derton / Technologies	Quote Extra Parts Required	1,120.56	ZAR	1.00	15.00	07/12/2023	Blanca Du Tait		N	A

Open Windows

User : Blanca 07/12/2023 Version : 2.5.1.4 v2514Example Company



For a detailed handling of this topic refer to Calls - Sales Quotes

Related Topics

- [Service - Introduction to Call Administration](#)
- [Call Administration - Edit a Call](#)
- [Call Administration - My Calls](#)
- [Call Administration - Assign a Call](#)
- [Call Administration - Start or End Work](#)
- [Call Administration - Close a Call](#)
- [Call Administration - Complete a Call](#)
- [Call Administration - Hold a Call](#)
- [Call Administration - Pend a Call](#)
- [Call Administration - Release a Call](#)
- [Call Administration - Reinstate a Call](#)

MNU.124.025