

SERVICE

WORK ORDERS - TRAVEL

Confirm with your supervisor as to whether <u>you</u> will log your travel, or whether the <u>call centre administration</u> will do this.

Travel will automatically be updated for clients using Tech Connect.

Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site* where the work order was assigned.
 - The example has *Durban* selected.
- 3. Set the *Status* to *Open*.
- 4. Click on the *row* of the *work order* you wish to *add* a travel claim to.
- 5. Click on the *Travel* tile.



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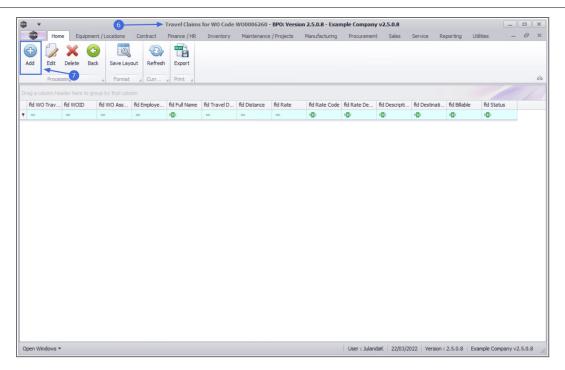
6. The *Travel Claims for WO Code [work order code]* screen will be displayed.

ADD TRAVEL CLAIM

7. Click on *Add*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.





8. The *Travel Entry* screen will be displayed.

Note that Travel will not be billed from here. Travel Radii or Travel Zones determine a set fee to charge a client for travel within a certain range of kilometres.Refer to Travel Radii

- Work Order: The work order initially selected will be populated in the text box.
- Employee: The name of the person currently adding the travel claim will display in the text box. Click on the down *arrow* to select the name of the employee the travel claim is being logged for.
- **Travel Date:** The current date will display in the field. Click on the down arrow to use the calendar function, to select the travel date.
- **Type:** Click on the down arrow to select the type of travel that applies to the travel claim.



- **Detailed Description:** Click to type in a description or reason for travelling.
- **Destination:** Click to type in the travel destination you are claiming for.
- **Distance:** Click to type in or use the arrow indicators to specify the total distance travelled in kilometres
- 9. When you have finished adding the travel details, click on *Save*.

		8-		Travel Entry -	BPO: Version 2.5.0.8 - E	cample Company	v2.5.0.8					_	
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- 10. You will return to the *Travel Claims for WO Code* screen.
- 11. When you receive the *Travel Processing* message to confirm that; *Travel Claim on WO: [work order code] complete.*
- 12. Click on **OK**.



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13. You can now *view* the travel claim in the *Travel Claims for WO Code* screen.

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EDIT TRAVEL CLAIM

- 1. From the *Travel Claims for WO Code [work order code]* screen,
- 2. Click on the *row* of the *travel claim* you wish to *edit*.
- 3. Click on *Edit*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.

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4. When you receive the *Travel Claims* message to confirm;

• Are you sure you want to edit this travel for [employee name] on WO [work order code]?

5. Click on Yes.



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- 6. The *Travel Entry* screen will be displayed.
- 7. Make the necessary changes to the Travel Claim entry.
- 8. Click on Save.

		6-		Travel Entry -	BPO: Version 2.5.0.8 - Ex	cample Company	v2.5.0.8			_ – ×
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Open Windows 🔻							User : JulandaK	22/03/2022	Version : 2.5.0.8	Example Company v2.5.0.8



- 9. You will return to the *Travel Claims for WO Code* screen.
- 10. When you receive the *Travel Processing* message to confirm;
 - Travel Claim on WO: [work order code] complete.
- 11. Click on *OK*.

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12. You can now *view* the updated details in the *Travel Claims for WO Code* screen.



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DELETE TRAVEL CLAIM

Note that you can only delete a travel claim that has an *A* - Active status.

- 1. From the *Travel Claims for WO Code [work order code]* screen,
- 2. Click on the *row* of the *travel claim* you wish to *delete*.
- 3. Click on *Delete*.

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



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	173	3688			Jade Rivers	18/03/2022	68.00			AA Travel Rate	Travelled to customer sit		No	A	

- 4. When you receive the *Time Bookings* message to confirm;
 - Are you sure you want to remove this travel for [employee name] on Work Order [WO number]?
- 5. Click on Yes.

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- 6. The *Status* of the deleted travel claim has been updated to *I* Inactive.
- 7. Click on *Back* to return to the *Work Order Listing* screen.

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