

SERVICE

MY WORK – VIEW CUSTOMER INFO AND CUSTOMER NOTES

Ribbon Access: Service > My Work



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **view** the related **customer information**.
- Click on **Edit**.

My Work - BPO: Version 2.1.0.58 - Example Company

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

Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DepName	Sc	
WO0001592	RSI V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HCP001	Hope Works	Technical	15	
<input checked="" type="checkbox"/>	WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	CH0000566	Toner required ...	CALL	HCP001	Hope Works	Technical	22
<input type="checkbox"/>	WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing						26	
<input type="checkbox"/>	WO0001662	Machine service required	Durban	O	SERV							15	
<input type="checkbox"/>	WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs						15	

Open Windows | 17 May 2018

The **Maintain WO** screen will be displayed.

- Click on the **Customer Info** tab on the right hand side of the screen.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Save

Back

Save Layout

Print

Maintain

Format

Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Description Toner check and clean required

Requestor Abigail Mine

WO Type Repair

Priority 2

Request Date 18 May 2018 09:42:59

Status Open

Billable

Capitalise

Work Order Item

Functional Location Equipment

Item 2020-103053

Comment Check Colour Toner - not printing effectively

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CH0000566
PMVIG	Project Reference	

Schedule

Assigned To Abigail Mine

Assigned By Abigail Mine

Scheduled Start 22 May 2018 00:00:00

Scheduled End 22 May 2018 02:00:00

Actual Start 17 Jun 2018 00:00:00

Actual End 17 Jun 2018 00:00:00

Delay Comments Currently on Schedule

Rectification Code

Rectification Comments

Completion Date 17 Jun 2018 00:00:00

Equipment Info

Customer Info

Required Crafts

Additional Data

Meters
Open Windows
17 May 2018

- The **Customer Info** docking panel will be expanded.
- Here you can view **Customer Info** details and any **Customer Notes**, if recorded.

The screenshot displays the 'Maintain WO' window for a work order. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with Save, Back, Save Layout, and Print buttons. A left-hand navigation pane lists various functions such as Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The main workspace is divided into several sections:

- Description:** Toner check and clean required
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 18 May 2018 09:42:59
- Status:** 0 - Open
- Billable:**
- Capitalise:**
- Work Order Item:** Functional Location (selected) and Equipment (selected). Item: 2020-103053
- Comment:** Check Colour Toner - not printing effectively

The **Customer Info** panel is expanded and shows the following details:

- Customer Code:** HCP001 - Hope Works
- Tel No:** 031 123 4567
- Contact No.:**
- Account Code:**
- Status:** A -
- VAT No:** 987654321
- Hold Reason:**
- Address:** Plot 91 Leaf Road Forest Hills New Town Durban South 1234
- Is Debtor:**

The **Customer Notes** panel displays a table of notes:

Notes	NoteDate	NoteTime	Fullname
Call customer to confirm order	09 Feb 2017	11:21:51	Judith Mudzengi
Existing third party contract pending	18 Apr 2016	12:09:00	Bianca Du Toit
Check toner yield	04 Aug 2014	00:00:00	Belinda Sharman

The bottom status bar shows the date 17 May 2018.

- If you wish to see more customer information, go back to the **My Work** listing screen.
- Click on the **row selector** in front of the **work order** where you wish to **view** the **customer details**.
- Click on **View Customer**.
- Follow the instructions to [View the Customer](#).

My Work - BPO: Version 2.1.0.58 - Example Company

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

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

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Open Windows | 17 May 2018

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