

SERVICE

CALLS - LOG A CALL

If the **WO Item Auto Assign** has been set in the company configuration, then a default machine can be selected to display, when a customer is selected.

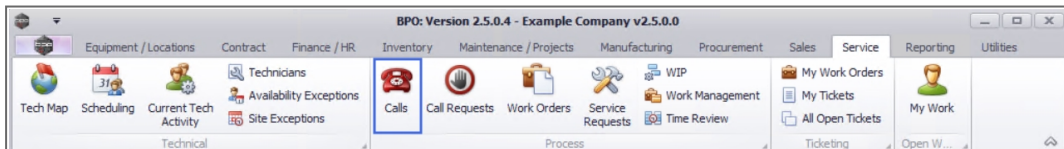
However, it is recommended that calls be logged by **serial number**, to generate an accurate service history, profitability, toner yields, etc.

When logging a call, you can **search** for the Customer by;

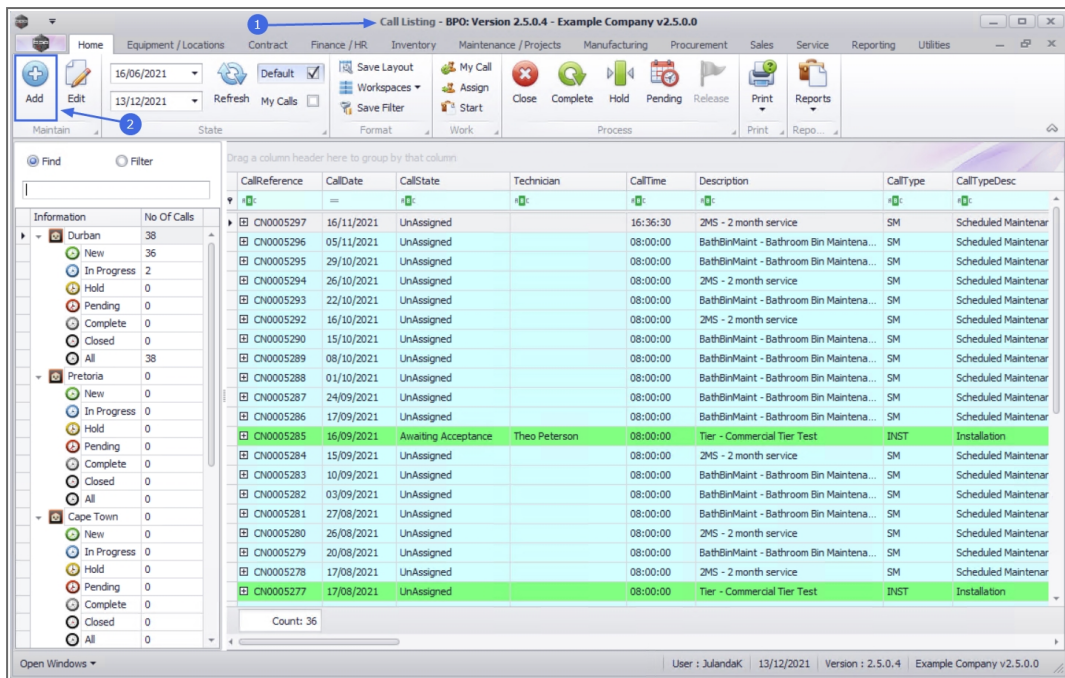
- Customer,
- Contact, or
- Telephone Number.

You cannot log a call for a customer that has a **hold** status.

Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.
2. Click on **Add**.

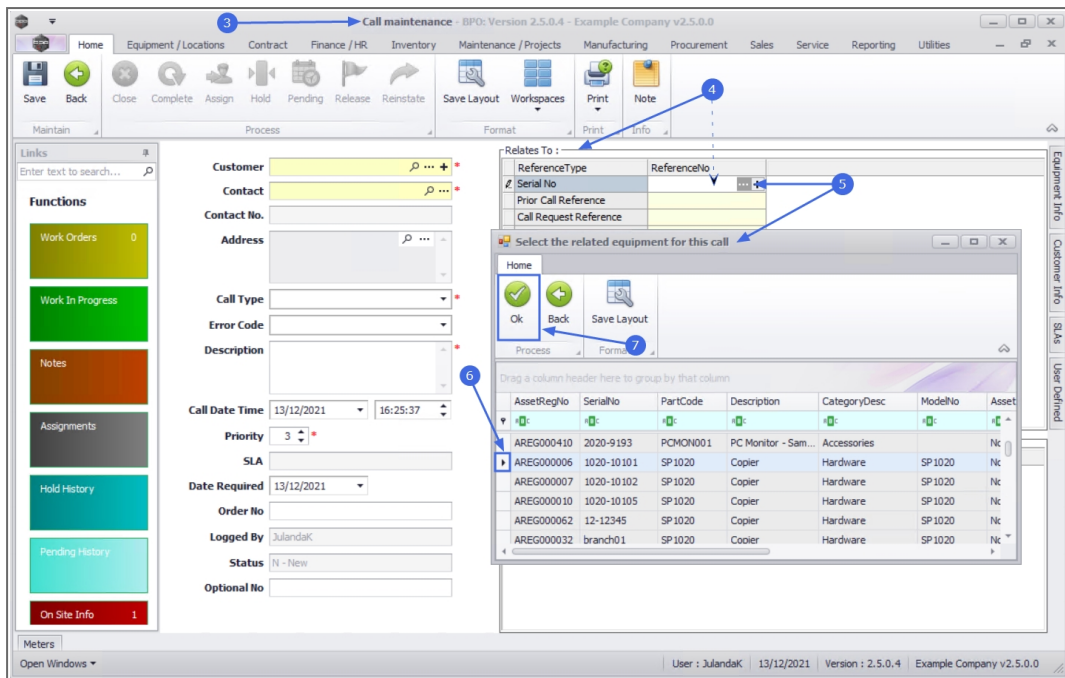


3. The **Call maintenance** screen will be displayed.

LOG CALL FROM THE SERIAL NUMBER

This is the recommended process to follow when logging a call. The customer details will populate the screen when selecting the serial number first.

4. In the **Relates To** frame, click in the **Serial No.** field to display the **ellipsis** button.
5. Click on the ellipsis button to display the **Select the related equipment for this call** screen.
6. Click on the **row** of the **serial no.** you wish to **log a call** against.
7. Click on **OK**.



The following fields will populate depending on the Serial Number you have selected;

- **Serial No:** The serial number field will populate with the serial number you selected.
- **Contract No:** The contract number field will populate with the contract number, if the equipment item you selected is on contract. If not then this will remain blank.
- **Customer:** The customer linked to the equipment selected, will populate this field.



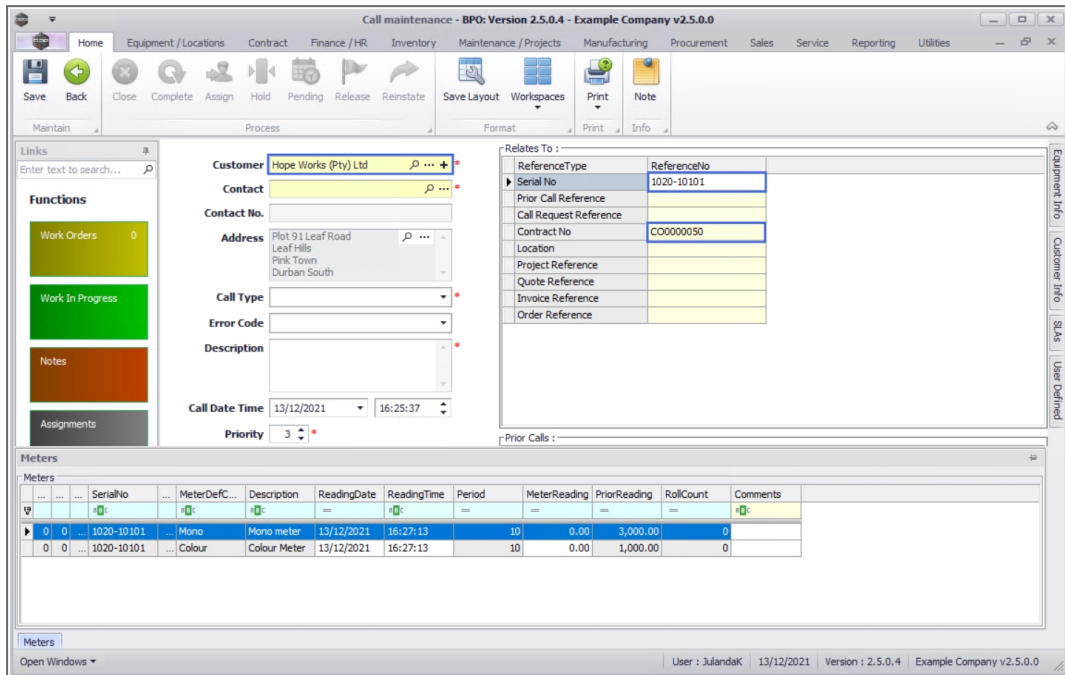
If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can update the details directly in the call screen. Refer to [Calls - Edit Buttons](#)



You cannot log a call for a Customer on Hold. Refer to [Calls - Customers on Hold](#) for information on how to **view** if the Customer is on **Hold** or not.



An optional telephone number for the Customer can be added to the call, which will be for your reference, when logging or editing the call. Refer to **"Optional Telephone Number "** on page 3



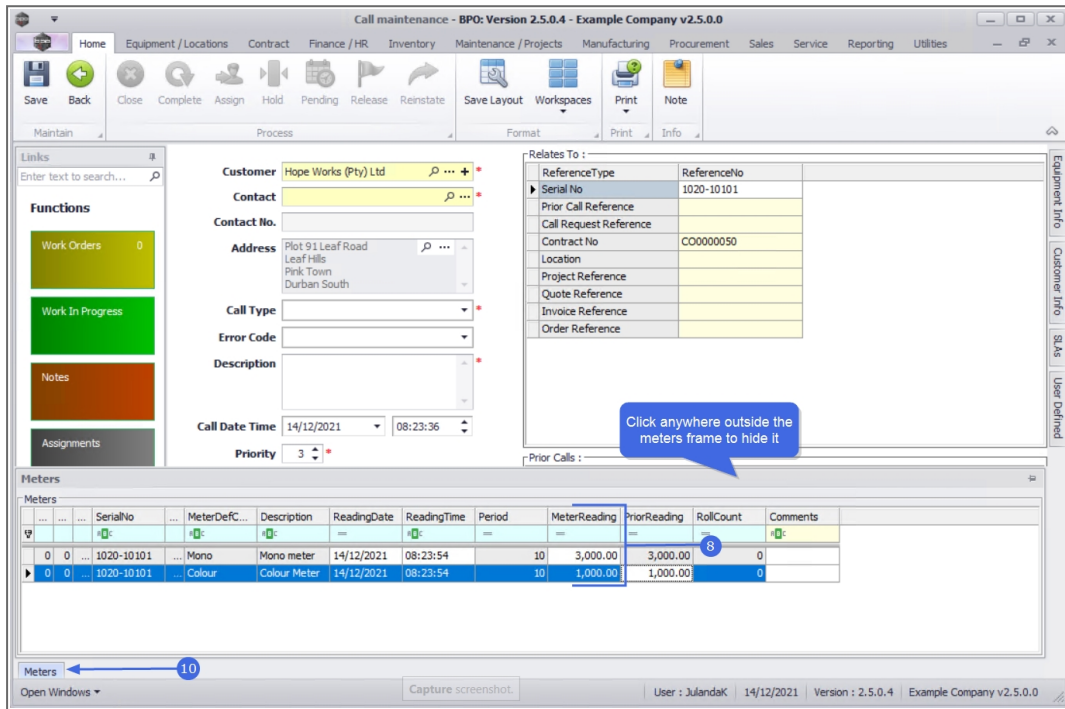
METERS FRAME

If the machine has meters linked, then the Meters docking panel will automatically expand to display the Meter reading data grid.

8. Type in the meter readings, if required.

- It is good practice to get the meter reading when logging a call, if this Call is related to a toner.
- 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.

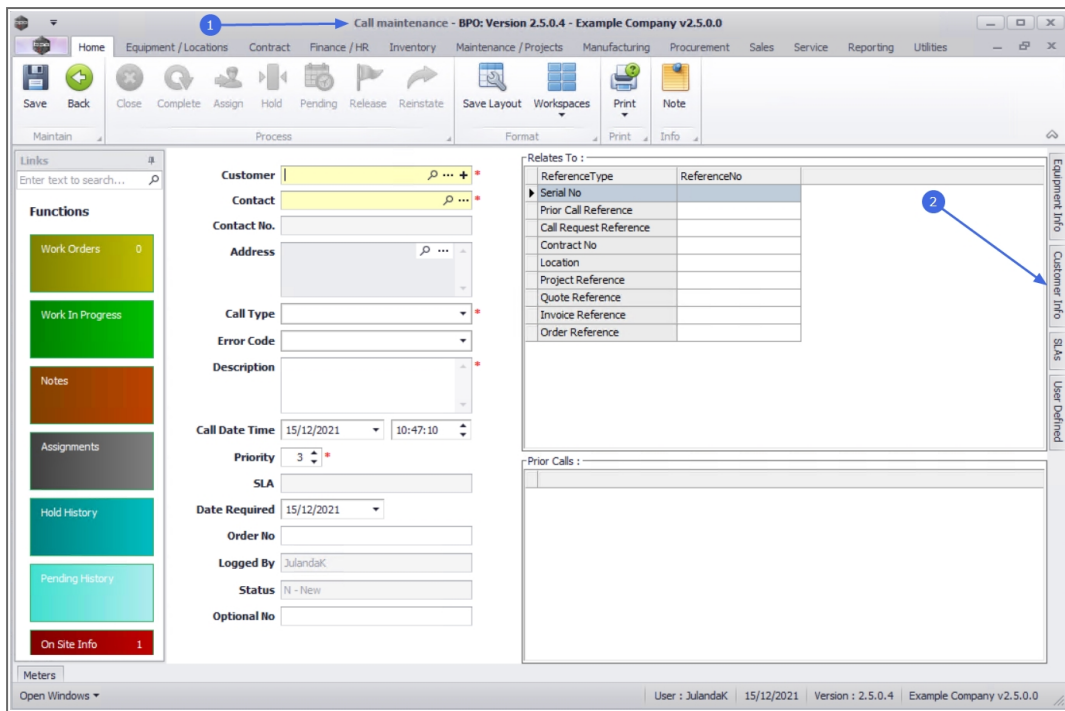
9. When the meter reading has been updated, **retract** the frame by clicking outside the frame.
10. Click on the **Meters tab** at the bottom of the screen, to **display** the frame.
11. Continue to " **Add Call Details** " on page 10, to complete logging the call.



FIND CUSTOMER BY TEL NO

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

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



3. **Tel No:** Type in the standard contact number for the customer and press **Enter**.
4. The **Customer** field, the **Customer Info** frame, the **Credit Status** frame and the **Customer Notes** frame will now populate with the details of the customer linked to that telephone number.



UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.



LOG CUSTOMER CALL

If you do not have the serial number, you can start by selecting the *customer*. When searching for the serial number, the equipment list will be limited to the machines linked to the customer you selected.

1. On the *Call maintenance* screen,
2. **Customer:** The **yellow** colouring of the field indicates that you can search for the customer, using one of two methods.



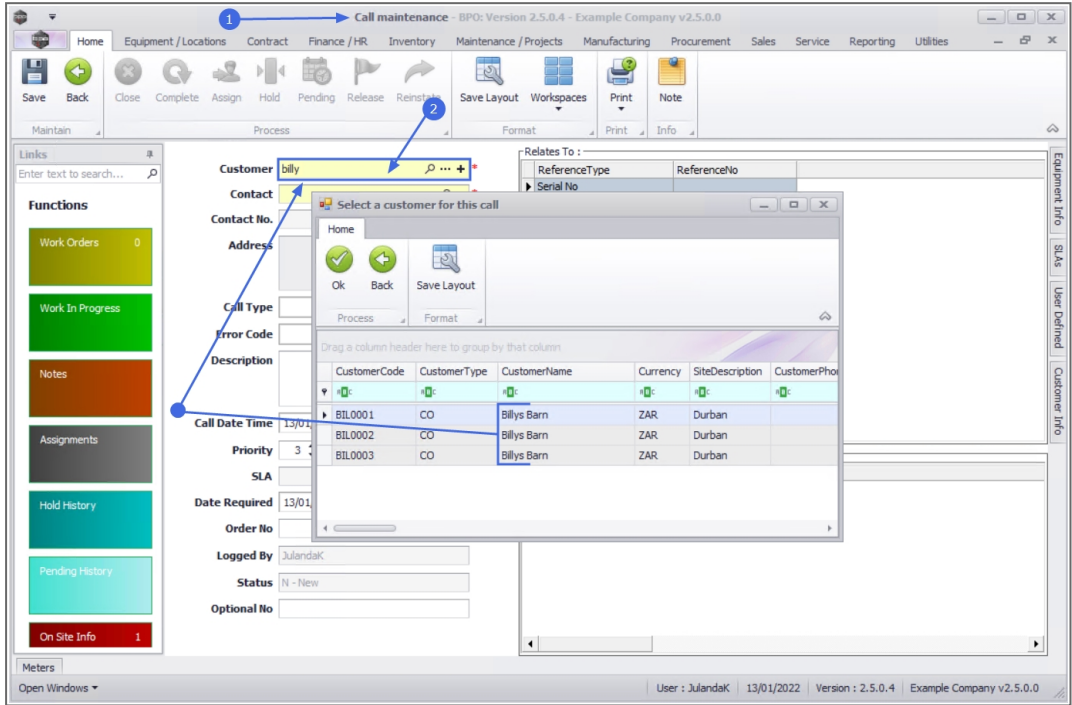
Method 1:

Type in a part of the Customer Name in the Customer field and press *Enter*.

The example has "billy" typed in the field. When pressing Enter, the system will locate all the Customers that has "billy" 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 "billy" forming a part of the name.



Method 2:

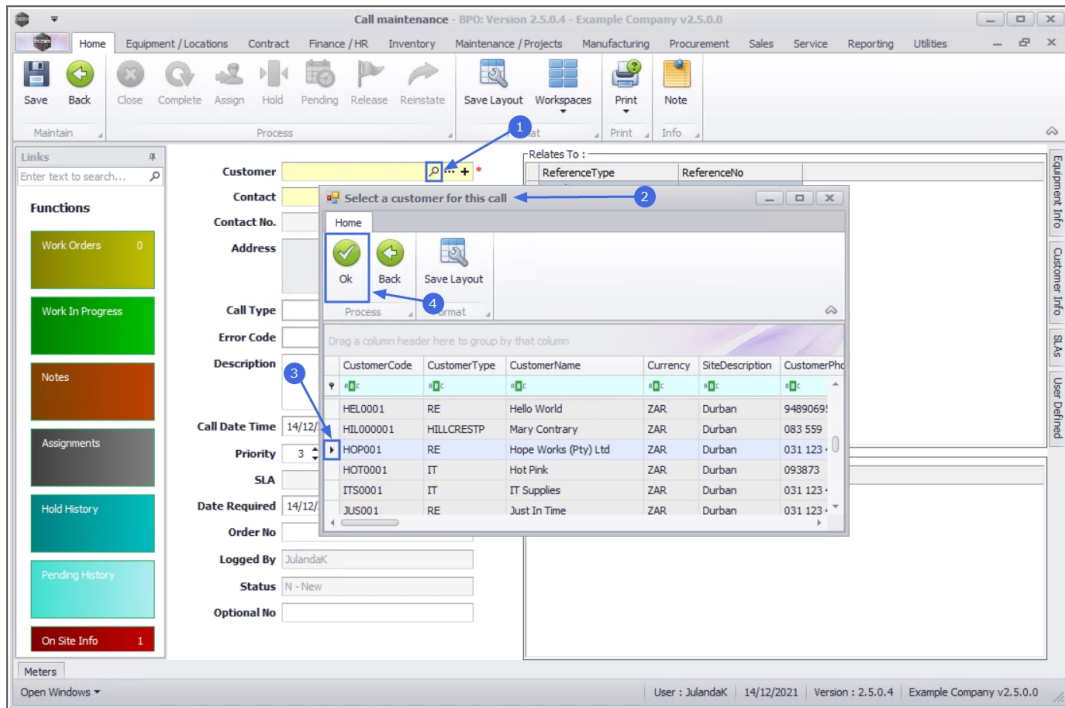
1. Click on the *search* button in the customer field.
2. The *Select a customer for this call* screen will display.
3. Click on the *row* of the *customer* you wish to *log a call* for.
4. Click on *OK*.



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

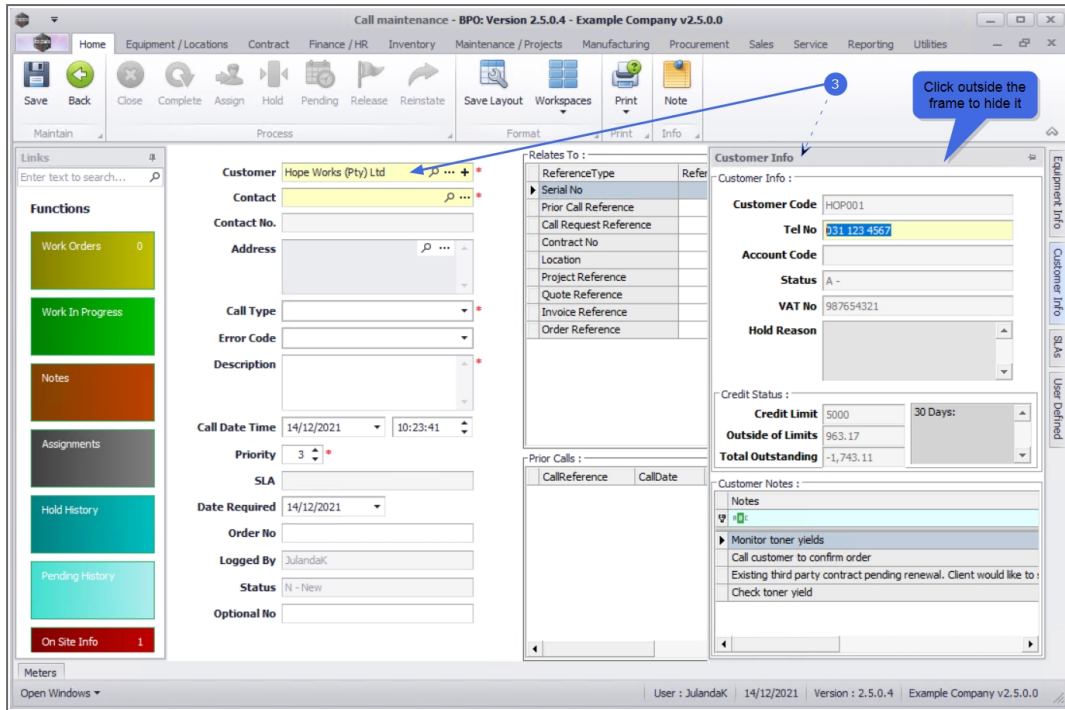
You cannot log a call for a Customer on Hold. Refer to [Calls - Customers on Hold](#) for information on how to **view** if the Customer is on **Hold** or not.

An optional telephone number can be added to the call, which will be for your reference, when logging or editing the call. Refer to **"Optional Telephone Number"** on page 3




3. The **Customer Info** docking panel will **expand** to display details for the selected customer.

Note that this screen is view only and no changes can be made to the customer information on this screen.

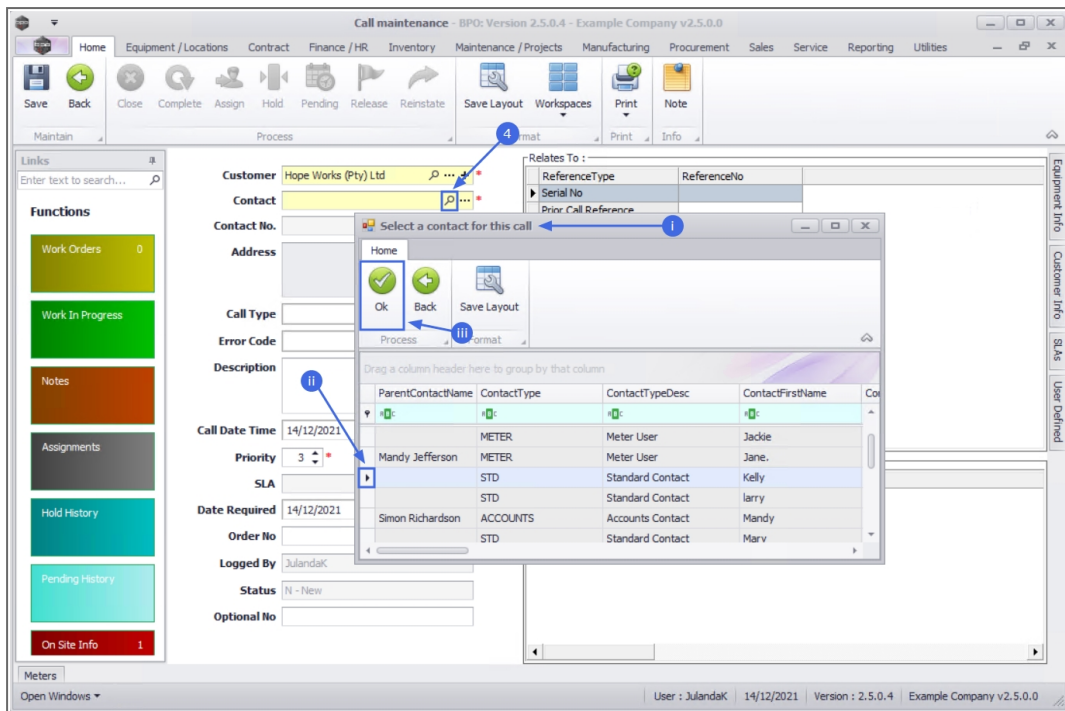


ADD CALL DETAILS

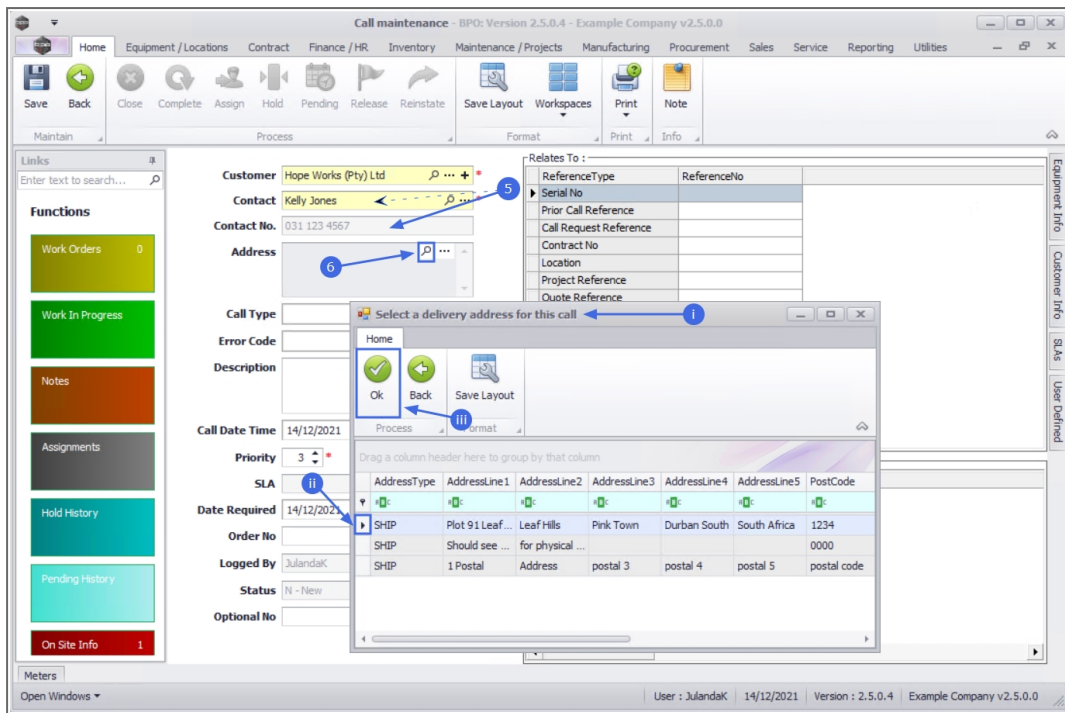
4. **Contact**¹: Click on the *search* button in the contact field.
 - i. The *Select a contact for this call* screen will display.
 - ii. Click on the *row* of the *contact* you wish to *add* to the *call log*.
 - iii. Click on **OK**.

 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](#) .

¹Note that this field is a Search field. You can type in a section of the contact name and press enter to update the Call screen. If more than one Contact exist with a similar name, then the search results will appear in the Select a Contact for this Call screen.



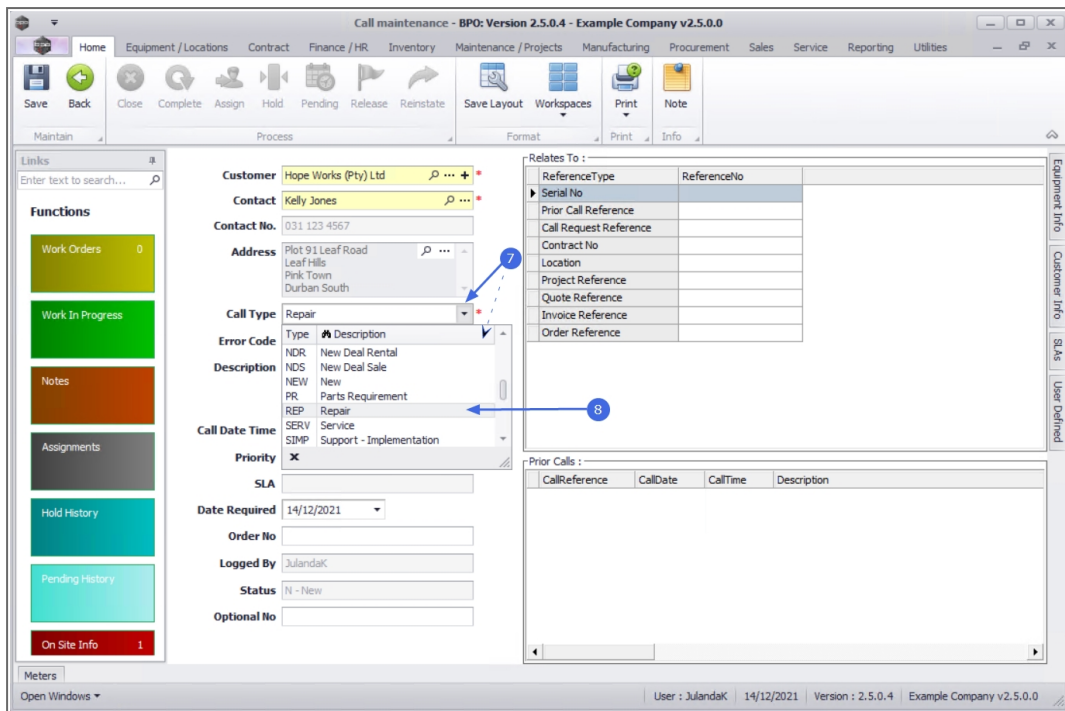
5. **Contact No:** The contact number field will be populated with the contact number for the customer contact.
6. **Address:** Click on the *search* button in the address field.
 - i. The *Select a delivery address for this call* screen will display.
 - ii. Click on the *row* of the address you wish to **add** for the *call*.
 - iii. Click on **OK**.



7. **Call Type:** Click on the down **arrow** to display the call type menu.
8. Select the required call type for the call.



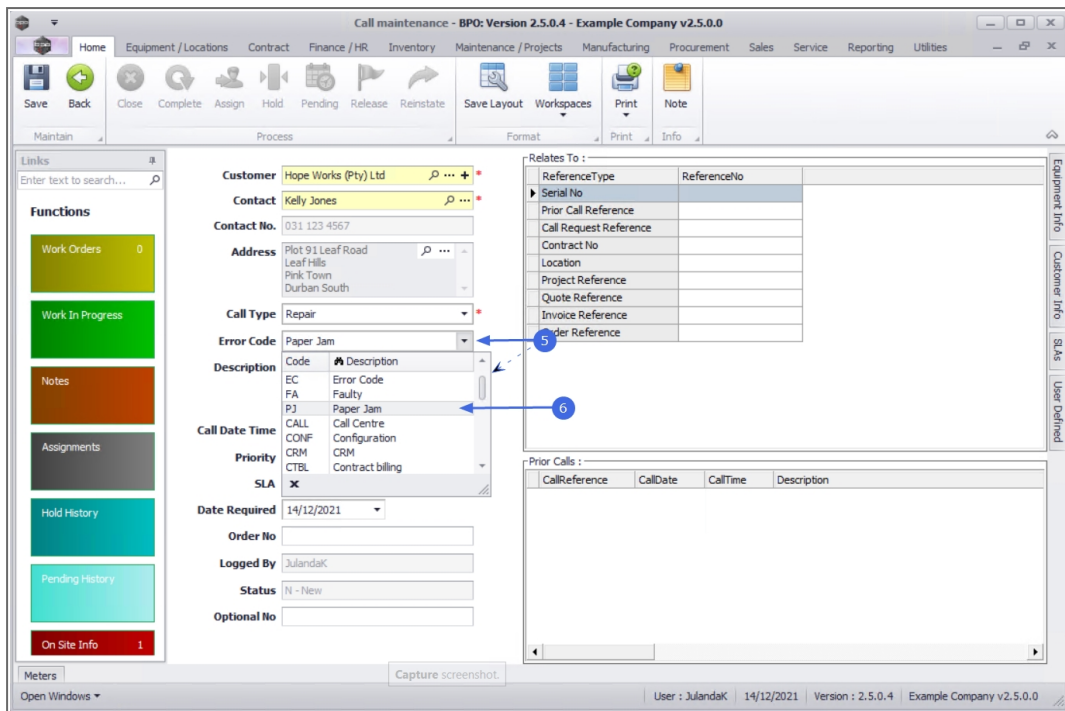
Refer to [Static Data - Call Types](#) if the call type required has not yet been configured.



9. **Error Code:** Click on the down **arrow** to display the error code list.
10. 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.



- **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.

¹ = Most Important 5 = Least Important

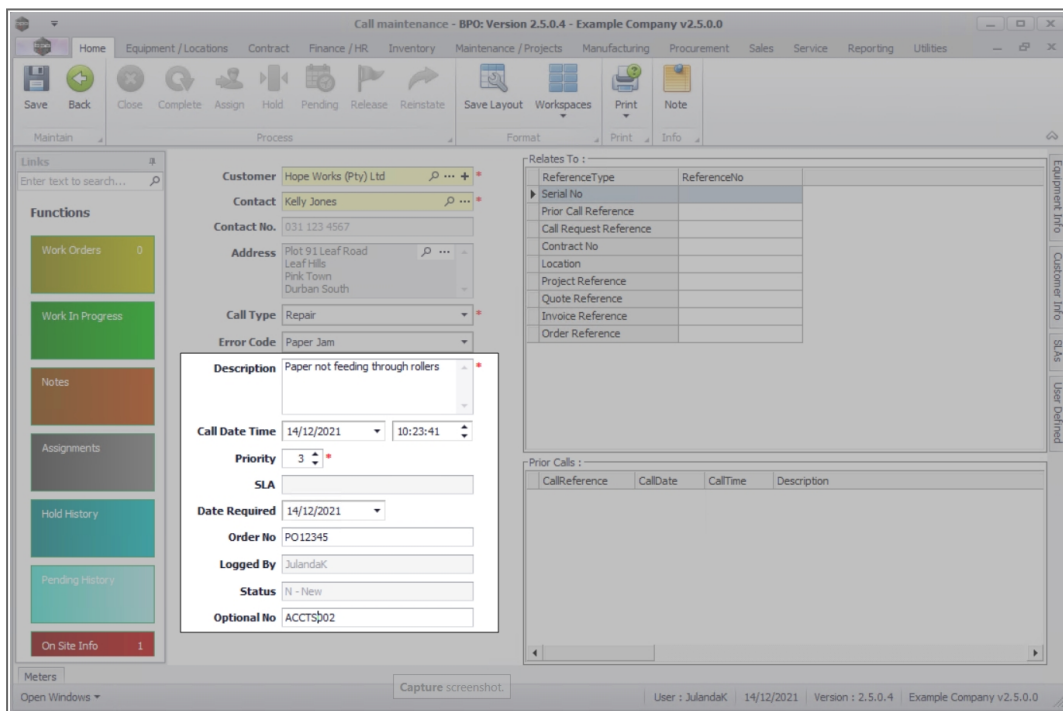
² This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required 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 shows the 'Call maintenance' interface for 'BPO: Version 2.5.0.4 - Example Company v2.5.0.0'. The main form contains the following fields:

- Customer:** Hope Works (Pty) Ltd
- Contact:** Kelly Jones
- Contact No.:** 031 123 4567
- Address:** Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South
- Call Type:** Repair
- Error Code:** Paper Jam
- Description:** Paper not feeding through rollers
- Call Date Time:** 14/12/2021 10:23:41
- Priority:** 3
- SLA:** (empty)
- Date Required:** 14/12/2021
- Order No:** PO12345
- Logged By:** JulandaK
- Status:** N - New
- Optional No:** ACCTS02

On the right side, there is a 'Relates To' table with columns 'ReferenceType' and 'ReferenceNo'. Below it is a 'Prior Calls' table with columns 'CallReference', 'CallDate', 'CallTime', and 'Description'. The interface also includes a top navigation bar, a left sidebar with 'Functions' (Work Orders, Work In Progress, Notes, Assignments, Hold History, Pending History, On Site Info), and a bottom status bar showing 'User: JulandaK 14/12/2021 Version: 2.5.0.4 Example Company v2.5.0.0'.

RELATES TO FRAME

Serial Number

If the Serial number for the machine was not used to log the call, then;

1. In the **Relates To** frame, click in the **Serial No.** field to display the **ellipsis** button.
2. Click on the ellipsis button to display the **Select the related equipment for this call** screen.
3. Click on the **row** of the **serial no.** you wish to log the call against.
4. Click on **OK**.



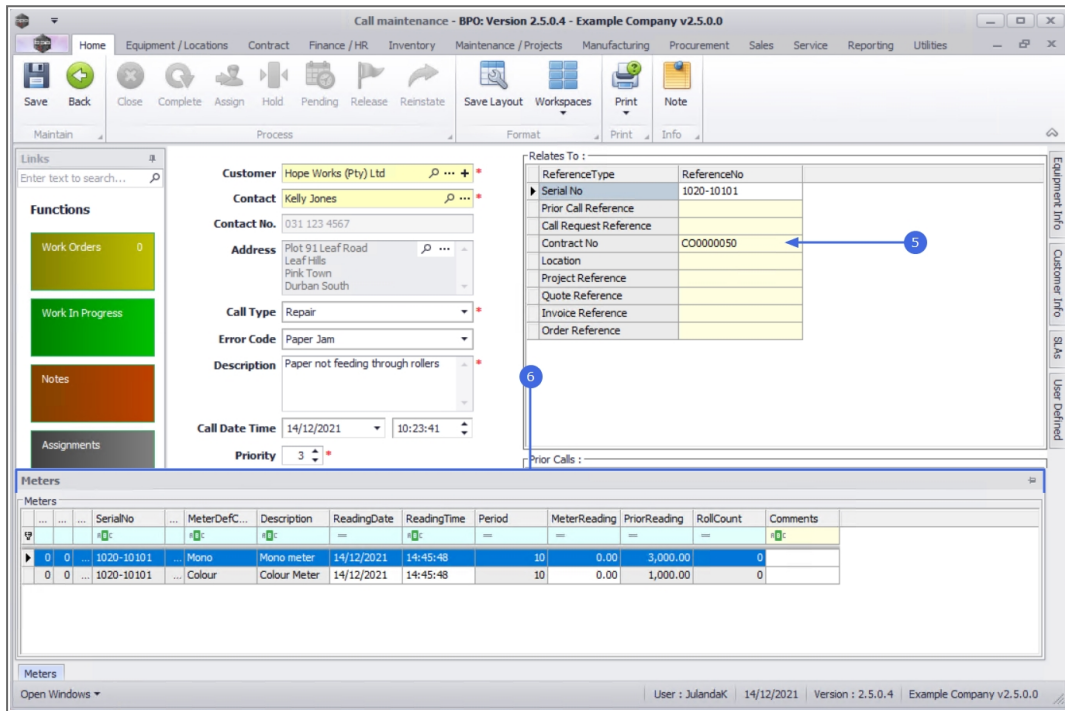
Note that as you have selected the customer first, the equipment list will be limited to the machines linked to the customer.

The screenshot shows the 'Call maintenance' software interface. The main window displays customer information for 'Hope Works (Pty) Ltd' and a call description 'Paper not feeding through rollers'. A 'Relates To' window is open, showing a list of reference types with 'Serial No.' selected. A 'Select the related equipment for this call' dialog box is also open, displaying a table of equipment records. Blue arrows and numbers 1 through 4 indicate the steps described in the text: 1. Clicking the ellipsis button in the 'Serial No.' field; 2. Clicking the ellipsis button to open the equipment selection dialog; 3. Clicking on a row in the equipment table; 4. Clicking the 'OK' button in the dialog.

AssetRegNo	SerialNo	PartCode	Description	CategoryDesc	ModelNo
AREG000006	1020-10101	SP 1020	Copier	Hardware	SP 1020
AREG000007	1020-10102	SP 1020	Copier	Hardware	SP 1020
AREG000062	12-12345	SP 1020	Copier	Hardware	SP 1020
AREG000223	1818-1111	SP 1818	Sprint copier	Hardware	
AREG000224	1818-2222	SP 1818	Sprint copier	Hardware	
AREG000219	1818-4444	SP 1818	Sprint cooier	Hardware	

Contract Number

5. If the machine you have selected is on contract, then the contract number field will be populated with the contract number for the machine.
6. If the machine has meters linked, then the "Meters frame" on page 4 will automatically expand to display the Meter reading data grid.



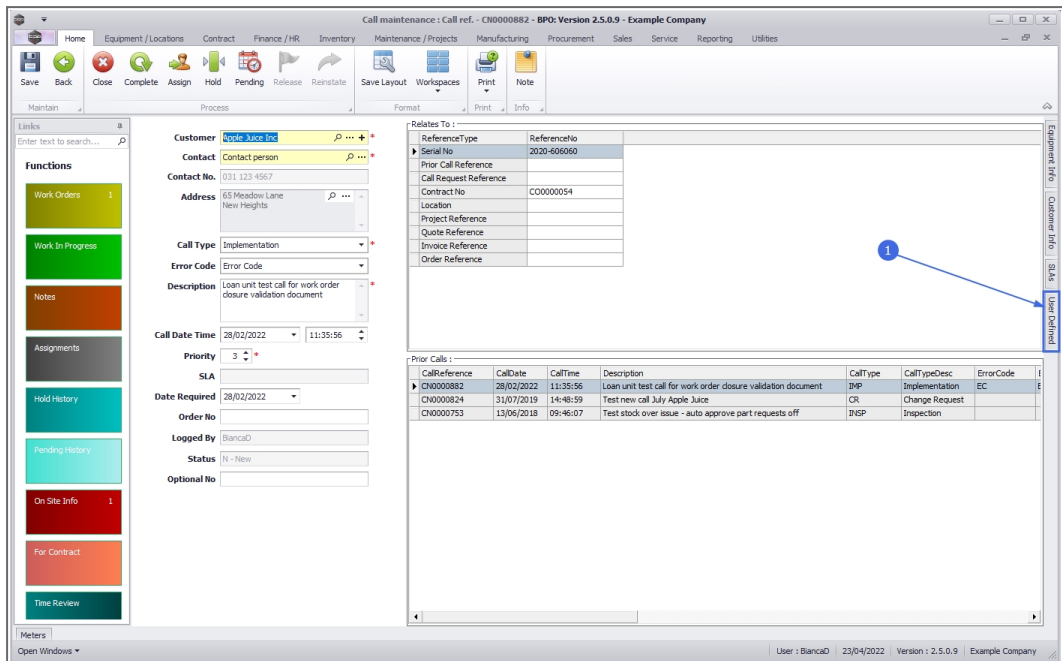
USER DEFINED FIELDS

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.

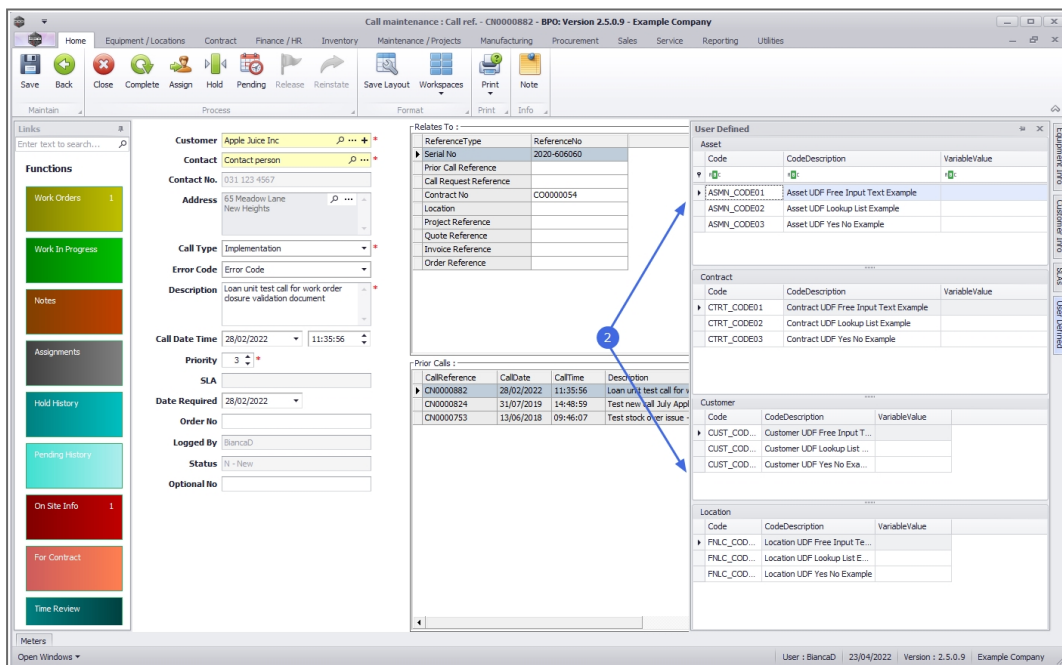
Version Compatibility¹

¹ BPO2 v2.5.0.8 or higher. " Add Interest Rate " on page 2

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



2. 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.



ADD CALL NOTE

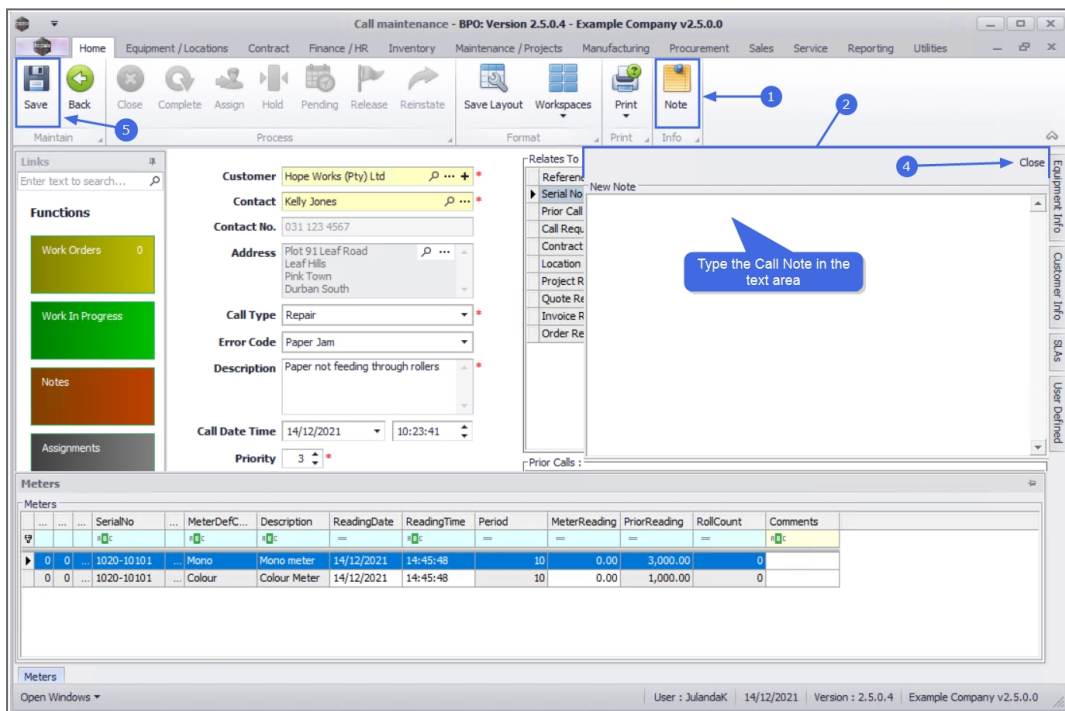
1. A Call Note can be added directly from the Call Maintain screen by clicking on **Note**.
2. The **New Note** frame will be displayed.
3. Click in the text area to type the customer note and click on **Close** when done.
4. The Note will be saved as a Call Note.



Refer to [Calls - Notes](#) to view a list of all the notes created for the Call

SAVE THE CALL

5. When you have done, click on **Save**.



6. 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**.



Note that as you Save the call log, the system automatically generates a work order. This work order will hold all the information logged against this call.

VIEW WORK ORDER DETAILS

- 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.

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

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005298	14/12/2021	UnAssigned		10:23:41	Paper not feeding through rollers	REP	Repair
Work Orders							
WCode	Description	SiteName	WOType	Status	StatusDescription	Priority	WorkPriority
W00006250	Paper not feeding through rollers	Durban	REP	O	Open	3	0.00
CN0005297	16/11/2021	UnAssigned		16:36:30	ZMS - 2 month service	SM	Schedulec
CN0005296	05/11/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005295	29/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005294	26/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Schedulec
CN0005293	22/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005292	16/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Schedulec
CN0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005287	24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installatio
CN0005284	15/09/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Schedulec
CN0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec

Count: 37

Related Topics

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

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