

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 <u>recommended</u> 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 <u>cannot</u> log a call for a customer that has a <u>hold</u> status.

Ribbon Access: Service > Calls

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



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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.

- In the *Relates To* frame, click in the *Serial No.* field to display the *ellip-sis* 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*.



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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 <u>is</u> on contract. If <u>not</u> 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 <u>directly</u> in the call screen. Refer to Calls - Edit Buttons

Vou <u>cannot</u> log a call for a Customer on Hold. Refer to **Calls - Cus**tomers on Hold for information on how to *view* if the Customer is on *Hold* or not.



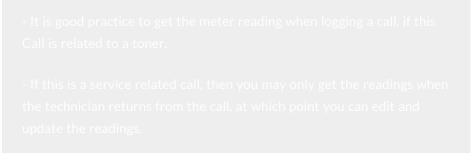
An optional telephone number for the Customer can be added to the call, which will be for your reference, when logging or editing the call. Refer to "Optional Telephone Number " on page 3

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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.



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- 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.

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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.



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- 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.

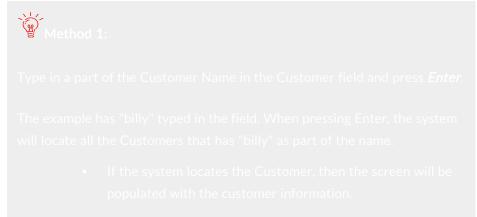




LOG CUSTOMER CALL

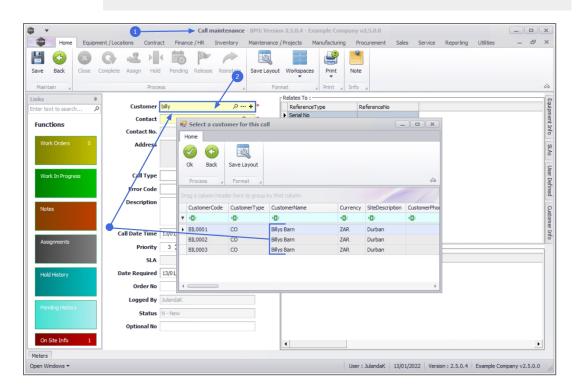
If you do <u>not</u> have the serial number, you can start by selecting the *customer*. When searching for the serial number, the equipment list will be limited to the machines linked to the customer you selected.

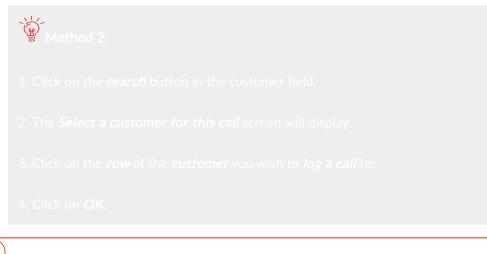
- 1. On the *Call maintenance* screen,
- 2. **Customer:** The yellow colouring of the field indicates that you can search for the customer, using one of two methods.





 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





If the *Company*, *Contact*, or *Address* details for the customer have *changed*, then you can update the details <u>directly</u> in the call screen. Refer to **Calls - Edit Buttons**

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Vou <u>cannot</u> 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

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

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



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ADD CALL DETAILS

- 4. **Contact¹:** 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.



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- 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.



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- 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.



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- 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 my not be set up, depending on system requirements.

Refer to Static Data - Call Error Codes for setting up error codes if not configured.



ф т				Call ma	intenance	BPO: Vers	ion 2.5.0.4 - Exa	mple Comp	pany v2.5	5.0.0				_ 0	x
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Work Orders	0	Address	Plot 91 Lea Leaf Hills	afRoad	<i>р</i>	-	Contract N Location	5							2
			Pink Town				Project Ref	erence							Istor
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Open Windows 🔻									User : Jula	andaK 14/	12/2021 Ve	ersion : 2.5.0.4	Example Co	mpany v2.5.0	.0 //

- **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.

• =			Call	maintenance	- BPO: Ver	sion 2.5.0.4 - Exa	nple Compa	ny v2.5.0.0					
Home	Equipmer	nt / Locations Contra	ct Finance / HR	Inventory	Maintenan	ce / Projects Ma	ufacturing	Procurement	Sales Ser	vice Reporting	Utilities		₽ ×
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	1 P	Customer	Hope Works (Pty) Lt	d p.	• + *	ReferenceT	/pe	ReferenceN	D				quip
		Contact	Kelly Jones	3	* *	Serial No							men
Functions		Contact No.				Prior Call Re Call Regues							Equipment Info
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Work orders		Address	Leaf Hills	,		Location							Cust
			Pink Town Durban South			Project Refe							ome
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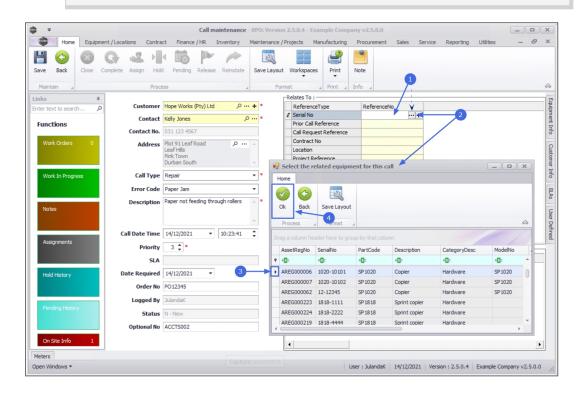
RELATES TO FRAME

Serial Number

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

- In the *Relates To* frame, click in the *Serial No.* field to display the *ellip-sis* button.
- 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 <u>first</u>, the equipment list will be limited to the machines linked to the customer.





Contract Number

- 5. If the machine you have selected <u>is</u> 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.

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	Contact	Kelly Jones	• م	Serial No	1020-10101	iner i
Functions				Prior Call Reference		Č.
	Contact No.	031 123 4567		Call Request Reference		6
Work Orders 0	Address	Plot 91 Leaf Road Leaf Hills	⊥ ··· م	Contract No Location	CO0000050	-5
		Pink Town		Project Reference		Jsto
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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

				Call maint	enance : Call re	f CN000088	32 - BPO: Versio	n 2.5.0.9 - Exam	ple Company				
Home Equip	ment / Locations Co	ntract Finance	/HR Inventory	/ Mainten	ance / Projects	Manufacturi	ng Procureme	nt Sales	Service Reporting	Utilities			- 8
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incoons	Contact No	031 123 4567			Call Request								
Work Orders 1	Address	65 Meadow Lane	<u>م</u>		Contract No		CO000054						
		New Heights			Location								
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	Priority SLA Date Required Order No	3 * 28/02/2022			CalReference CN0000882 CN0000824	28/02/ 31/07/	2022 11:35:56 2019 14:48:59	Loan unit test Test new cal	July Apple Juice		IMP CR	Implementation Change Request	
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Hold History	Priority SLA Date Required Order No Logged By Status	<pre>/ 3 * / 28/02/2022 / BancaD / BancaD / N - New</pre>			CalReference CN0000882 CN0000824	28/02/ 31/07/	2022 11:35:56 2019 14:48:59	Loan unit test Test new cal	July Apple Juice		IMP CR	Implementation Change Request	
Hold History Pending History On Site Info 1	Priority SLA Date Required Order No Logged By Status	<pre>/ 3 * / 28/02/2022 / BancaD / BancaD / N - New</pre>			CalReference CN0000882 CN0000824	28/02/ 31/07/	2022 11:35:56 2019 14:48:59	Loan unit test Test new cal	July Apple Juice		IMP CR	Implementation Change Request	
Hold History Pending History On Site Info For Contract	Priority SLA Date Required Order No Logged By Status	<pre>3 * 3 * 4 28/02/2022 5 7 BlancaD 5 N - New</pre>			CalReference CN0000882 CN0000824	28/02/ 31/07/	2022 11:35:56 2019 14:48:59	Loan unit test Test new cal	July Apple Juice		IMP CR	Implementation Change Request	
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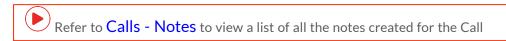
 Any custom fields configured and updated for the related *Customer*, *Asset* or *Location* and /or Contract linked to this call will display in the User Defined field panel.

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Enter text to search	<u></u>			Serial No		0-606060		Asset Code	CodeDescription		VariableValue
Functions				Prior Call Reference				9 10:	(D)		variablevalue
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Work Orders 1	Address	65 Meadow Lane 🔎 …		Contract No	CO0	000054		ASMIN_CODEC			
		New Heights		Location			1	ASMIN_CODEC			
				Project Reference Ouote Reference			_ /	ASMIN_CODEC	3 Asset UDF Yes No Exar	ple	
Work In Progress	Call Type	Implementation •		Invoice Reference			- /				
				Order Reference			- /				
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Assignments	Priority	3 🗘 *		Prior Calls :							L
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	Logged By	BiancaD						CUST_COD			
Pending History	Status	N - New						-	Customer UDF Yes No Exa		
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For Contract								FNLC_COD	Location UDF Lookup List E		
								FNLC_COD	Location UDF Yes No Example		
Time Review											
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Open Windows *									Liser : BiancaD 23/04	/2022 Version :	2.5.0.9 Example Company
									20/01		and the second second



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.
- 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.



SAVE THE CALL

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

				Call ma	intenance -	BPO: Versio	on 2.5.0.4	- Example	e Company v	2.5.0.0					_ – x
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Save Back Close	Complete A	Ssign Hol	A Bendin	P	Reinstate	Save Layou	et Marke	_	Print Note		-1		9		
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Work Orders 0		Address	Plot 91 Lea Leaf Hills	afRoad	<i></i> م	-	Loca			Type th	ne Call N	lote in ti	ne		ę
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Meters															
Open Windows -									User :	JulandaK	14/12/202	21 Versi	on : 2.5.0.4	Example C	ompany v2.5.0.0
															14

You will return to the *Call Listing* screen where you can *view* the new *call log*.



7. 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.

Add Mair	Ed	17/06	ipment / Location 5/2021 • 2/2021 •	Ref	Contract Fine Default resh My Calls	X Save I	Layout 🥵 I ipaces 👻 🍕 K Filter 伦 S	enance / Pr My Call Assign Start	rojects Manufacturing	A Bending	It Sales Service Reporting L Release Print Reports Print Reports	Julities	_ & >
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	v Durban 39			2	E CN0005298	14/12/2021	1 UnAssigned			10:23:41	Paper not feeding through rollers	REP	Repair
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- 1	💿 Pre	etoria	0	111		08/10/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	\odot	New	0			01/10/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
		In Progress	0	111		24/09/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	\odot	Hold	0	111		17/09/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	-	Pending	0	11		16/09/2021	Awaiting Acce	otance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installatio
	-	Complete	0	- 1	E CN0005284	15/09/2021	UnAssigned	promoc	Theore etc. borr	08:00:00	2MS - 2 month service	SM	Scheduled
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	_	pe Town	0		E CN0005282	27/08/2021	-			08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
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		In Progress Hold	0			26/08/2021	UnAssigned			08:00:00	2MS - 2 month service	SM	Scheduled
	-	Pending	0			20/08/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	<u> </u>	Complete	0		CN0005278	17/08/2021	UnAssigned			08:00:00	2MS - 2 month service	SM	Scheduled
	-	Closed	0		Count: 3	7							
	ŏ		0 ,		4								

VIEW WORK ORDER DETAILS

- 1. 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.
- 3. The *Work Order data grid* will expand to display the generated *work order number* and all the information related to the call log.



Add E Maintain	17/06	ipment / Location 5/2021 2/2021 Sta	Refre		ict Finance Refault 🗹 Ity Calls 🗌		Save La Workspi Save Fil	yout aces ▼ ter	Aaintenance / P My Call Assign Start Work	Close	Complet	te Hold	Procuremen Produce Pending	nt Sale: Release	Print F	Reporting Reports	Utilities	- 8	×
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Informat		No Of Calls			0005298	14/12	2/2021	UnAssign	ned				10:23:41	Paper n	ot feeding thro	ough rollers	REP	Repair	
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Related Topics

- Introduction to Work Orders
- Calls Add New Contact
- Calls Edit Buttons
- Calls Customers on Hold

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