SERVICE

CALLS - EDIT A CALL

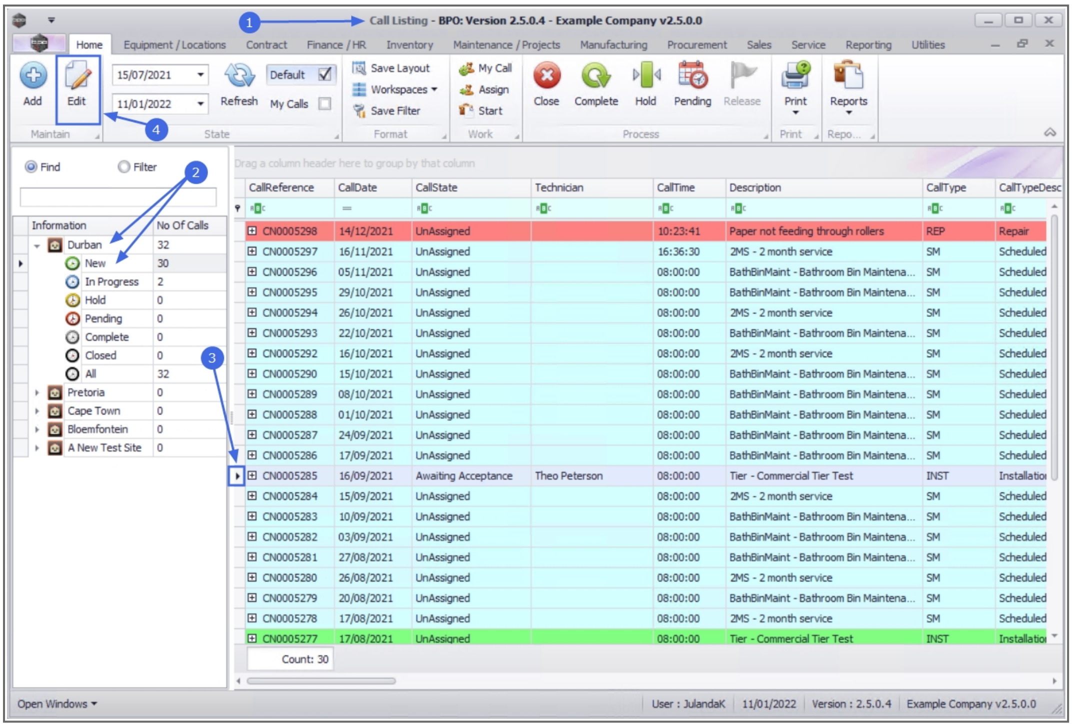
You may need to **edit** a call, if the main detail, such as the *Call Description*, is incorrect. The call needs to be **saved** after editing.

A call can be edited in order to view the selected call details and to log call information, such as, book technician time, log part and service requests, raise invoices, etc. The item itself will be saved against the call, and the call itself does not need to be saved.

Ribbon Access: *Service > Calls*

1. The ***Call Listing*** screen will be displayed.
2. Select the ***Site*** and ***Status*** filters on the left of the screen.
    - The example has the ***New*** status and ***Durban*** selected.
3. Click on the ***row*** of the ***call*** you wish to ***edit***.
4. Click on ***Edit***.

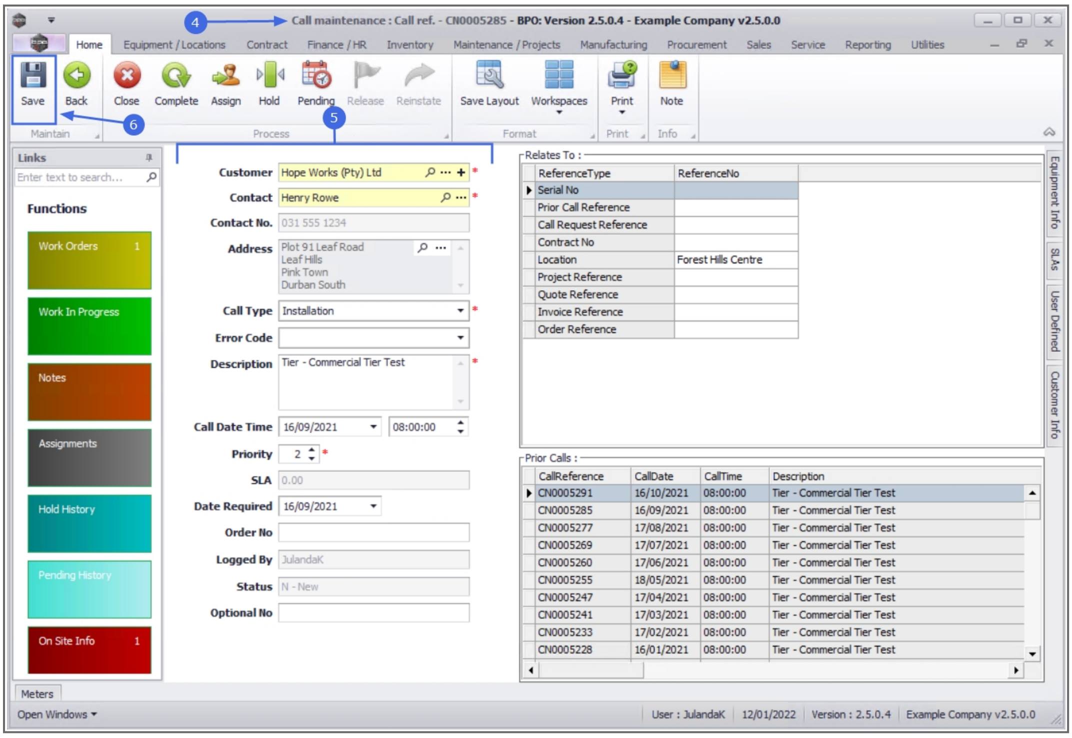
Short cut Key: ***Double click*** in the ***row*** of the call you wish to **edit**.



4. The ***Call maintenance: Call ref. - [****call ref number****]*** screen will be displayed.
5. Make the changes to the Call log as required.

> 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

6. ***Save*** the Call when done.



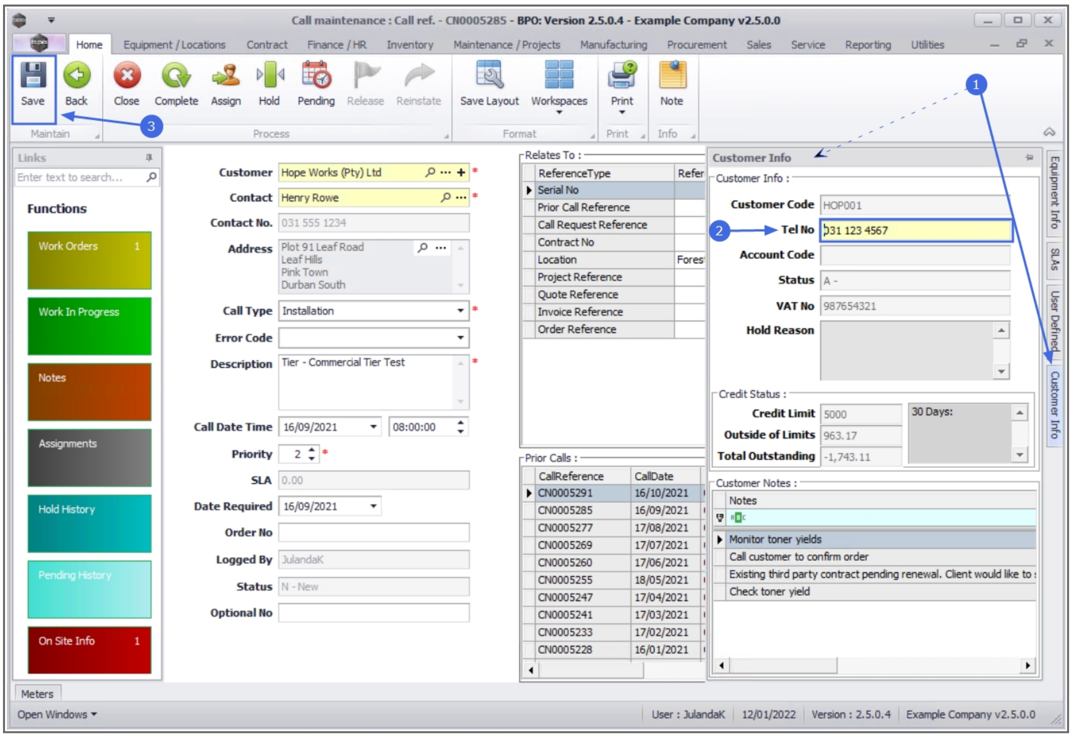
OPTIONAL TELEPHONE NUMBER

An optional telephone number can be added to the call, which will be for your reference, when logging or editing the call.

1. Click on the ***Customer Info*** tab to expand the ***Customer Info*** docking panel.
2. Click in the ***Tel No.*** field and type in the new number as required.

> Note that the number will be *saved automatically*. The number can be changed when required, by simply typing the new number over the number in the Tel No. text box.

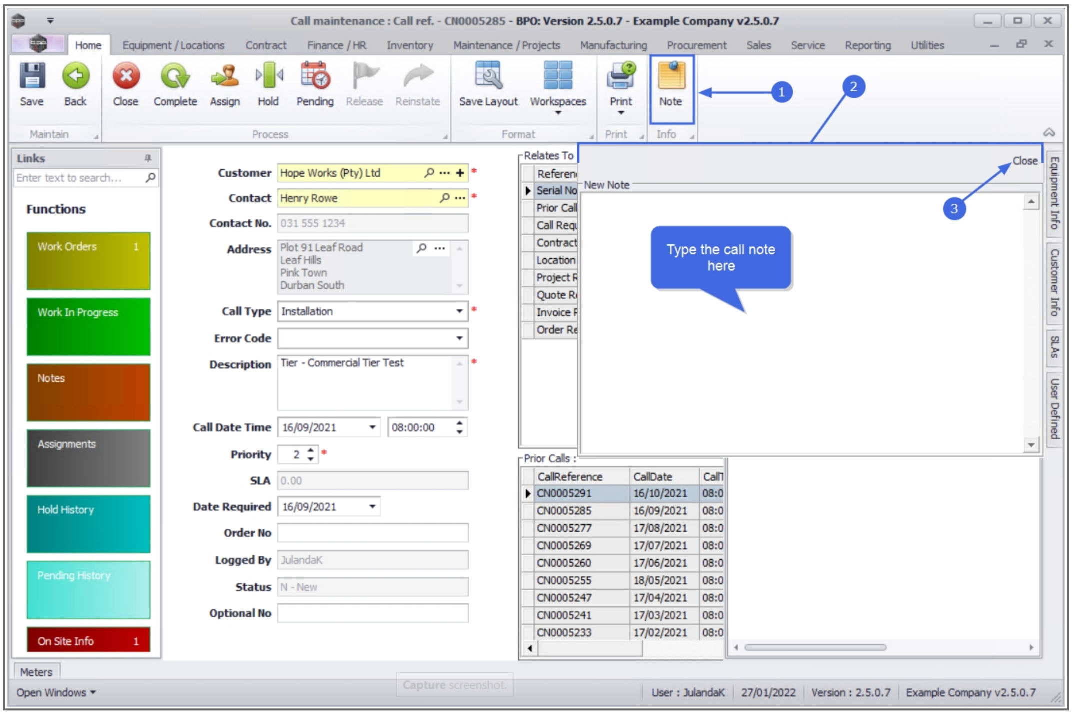
3. ***Save*** the Call when done.



ADD CUSTOMER 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.

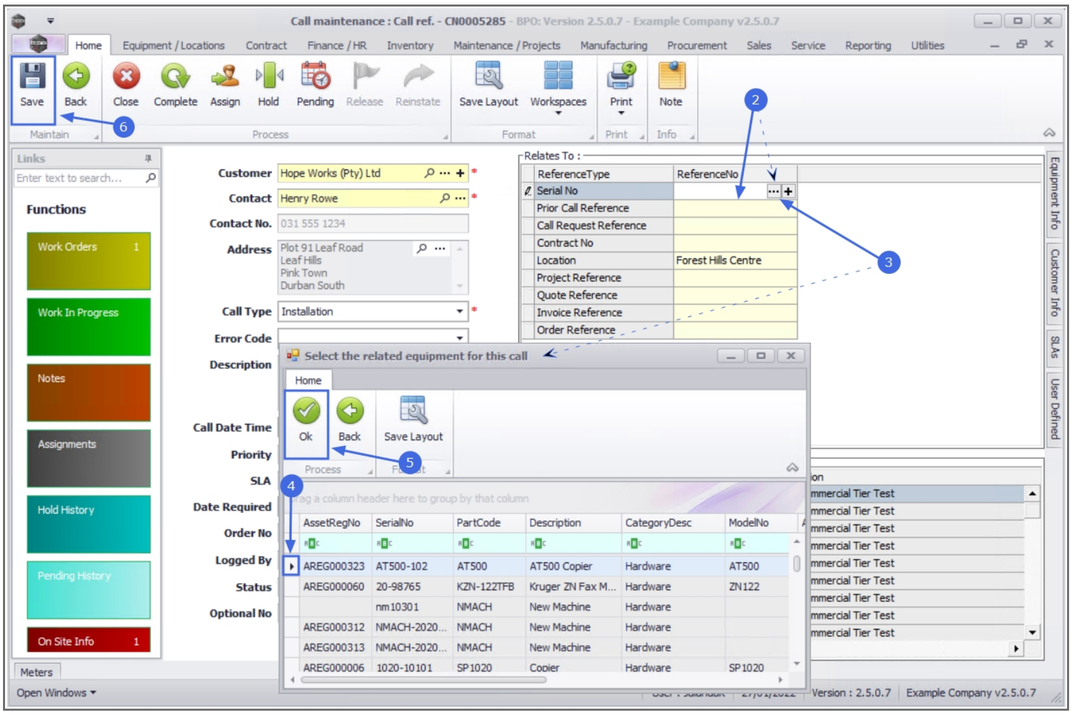
Refer to Calls - Add a Call Note to view a list of all the notes created for the Call



RELATES TO TAB

Reference information can be linked to call when it becomes available.

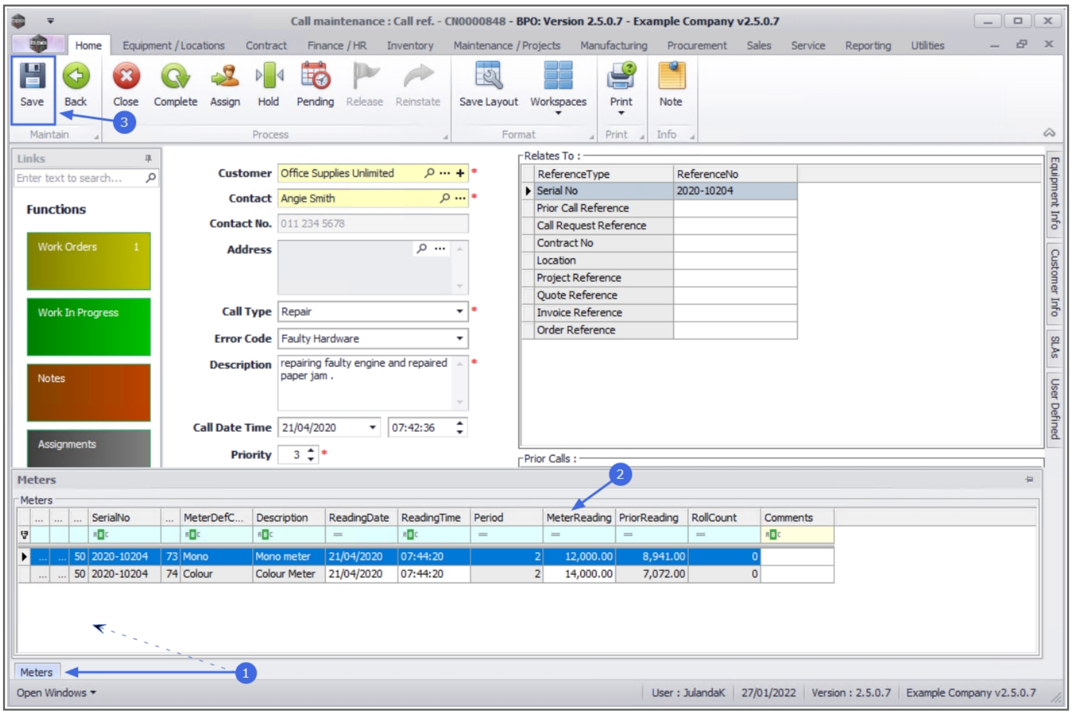
1. For the example a Serial Number has been linked to the call.
2. Click in the ***Reference No*** field of the ***Reference Type*** to display the ellipses button.
3. Click on the ***ellipses*** button to display the ***Select the related [****the info may vary depending on your selection****] for this call***.
4. Click on the ***row*** of the item you wish to link.
5. Click on ***OK***.
6. ***Save*** the Call when done.



ADD METER READING

The Meter Reading for a machine can be updated after a call was created.

1. Click on the ***Meters tab*** at the bottom of the screen to expand the ***Meters frame***.
2. Type in the ***Meter Reading*** as required.
3. ***Save*** the Call when done.



FUNCTION TILES

From the Work Orders tile you can view all the work orders linked to the call. From here you can ***Add***, ***Edit***, ***Delete*** and ***View*** a work order, as well as ***Close***, ***Complete*** and ***Reinstate*** and ***Print*** a work order. Refer to Calls - Work Orders

From the Work In Progress tile you can view the work in progress for the call as well as ***Return*** Assets or Equipment, ***Invoice a Work Order*** or ***Invoice a Project***. Refer to Calls - Work in Progress (WIP)

From the Notes tile you can ***Add*** and ***view*** the Notes linked to a Call. Refer to Calls - Notes

From the Assignments tile you can view the assignment listing for the call, as well as ***Add*** an assignment, ***Delete*** or reject an assignment or ***Force Accept*** and assignment on behalf of a Technician. Refer to Calls - Assignments

The Hold History tile directs you to the Hold Events listing for the Call where you can view the Hold History for the call. Refer to Calls - Hold History

The Pending History tile directs you to the Pending Events listed for the Call. Refer to Calls - View Pending History

The On Site Info tile directs you to the Machine List for the Company screen where you can ***Add***, ***Edit***, ***Delete*** and ***View*** customer equipment, as well as ***Revalue***, ***Convert*** or ***Buy Back*** equipment. Refer to Calls - On Site Info

PROCESSING TILES

Related References

- Introduction to Work Orders
- Calls - Edit Buttons

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