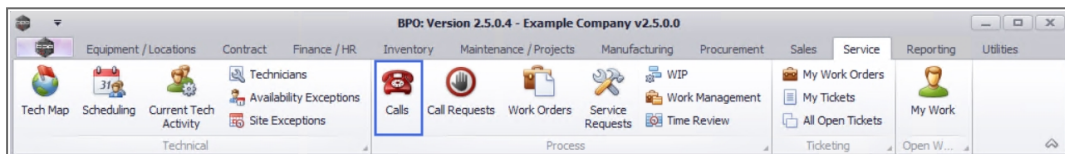


SERVICE

CALLS - NOTES

Call notes can be used to capture any additional information for a call.

Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.
2. Select the **Site** and **Status**.
 - The example has **Durban** as site and the **New** status selected.
3. Click on the **row** of the **call** you wish to add or view the notes of.
4. Click on **Edit**.

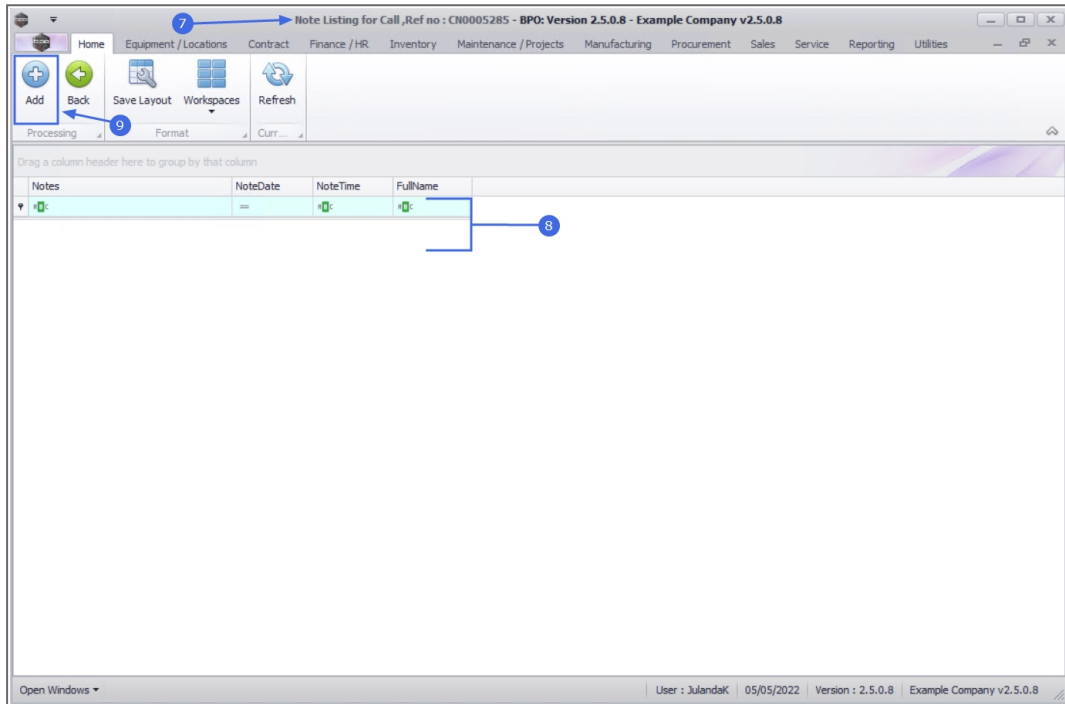
5. The **Call maintenance: Call ref. - [call ref number]** screen will be displayed.

6. Click on the **Notes** tile.

7. The **Note Listing for Call, Ref no: [call ref number]** screen will be displayed.
8. Any notes that have been created for the call will be listed in the data grid.

ADD CALL NOTE

9. Click on **Add**.

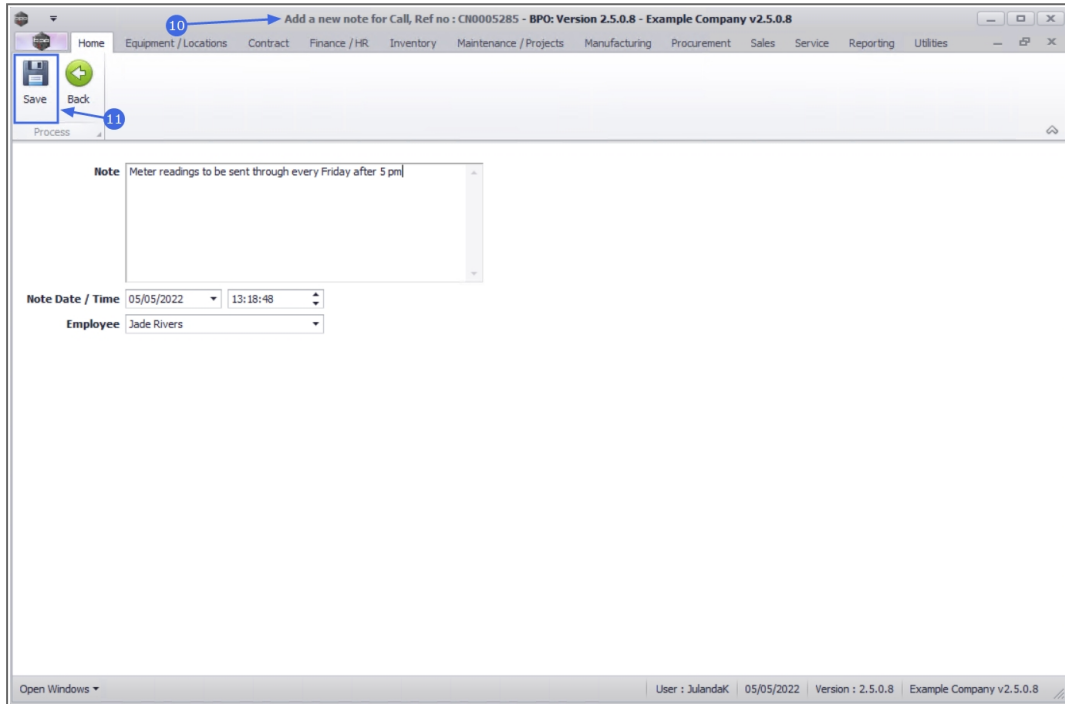


10. The **Add a new note for Call, Ref no: [call ref number]** screen will be displayed.
 - **Note:** Click in the text box to type the note details related to the call.
 - **Note Date / Time:** These fields will display the current date and time.
 - Date: Click to type in or use the down arrow to select and alternative date using the calendar

function.

- **Time:** Click to type in or use the arrow indicators to select an alternative time.
- **Employee:** The person currently adding a the note will display in this field. Click on the down arrow to select a different employee.

11. When you have finished adding the note details, click on **Save**.

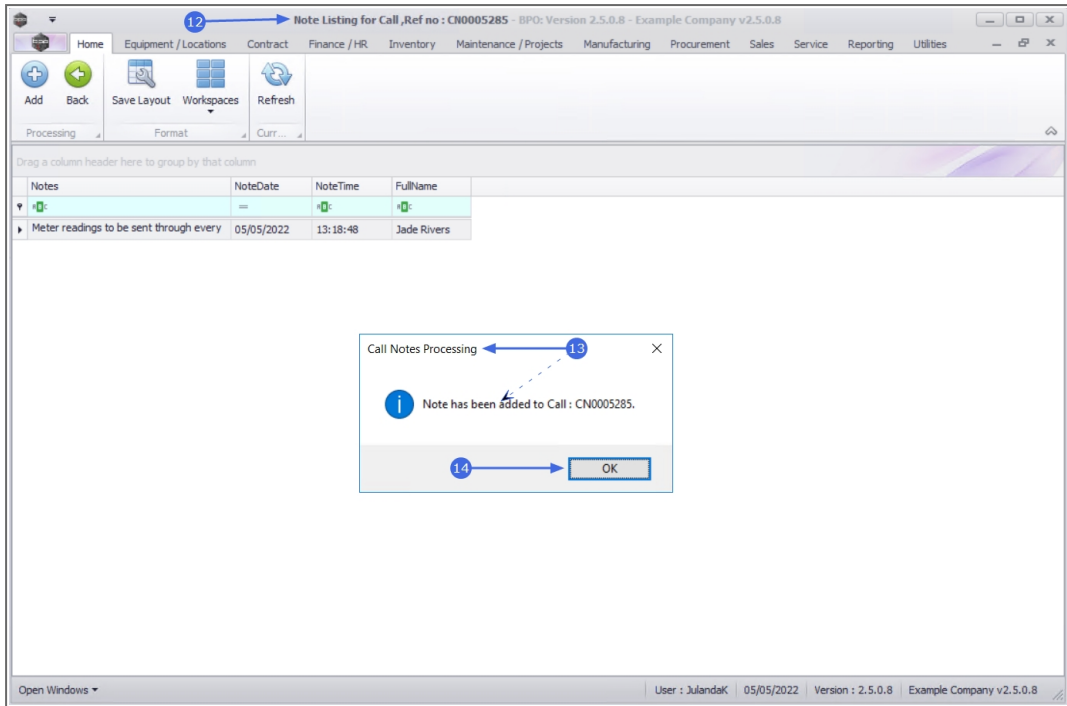


12. You will return to the updated **Note Listing for Call, Ref no:** screen.

13. The **Call Note Processing** message will confirm that;

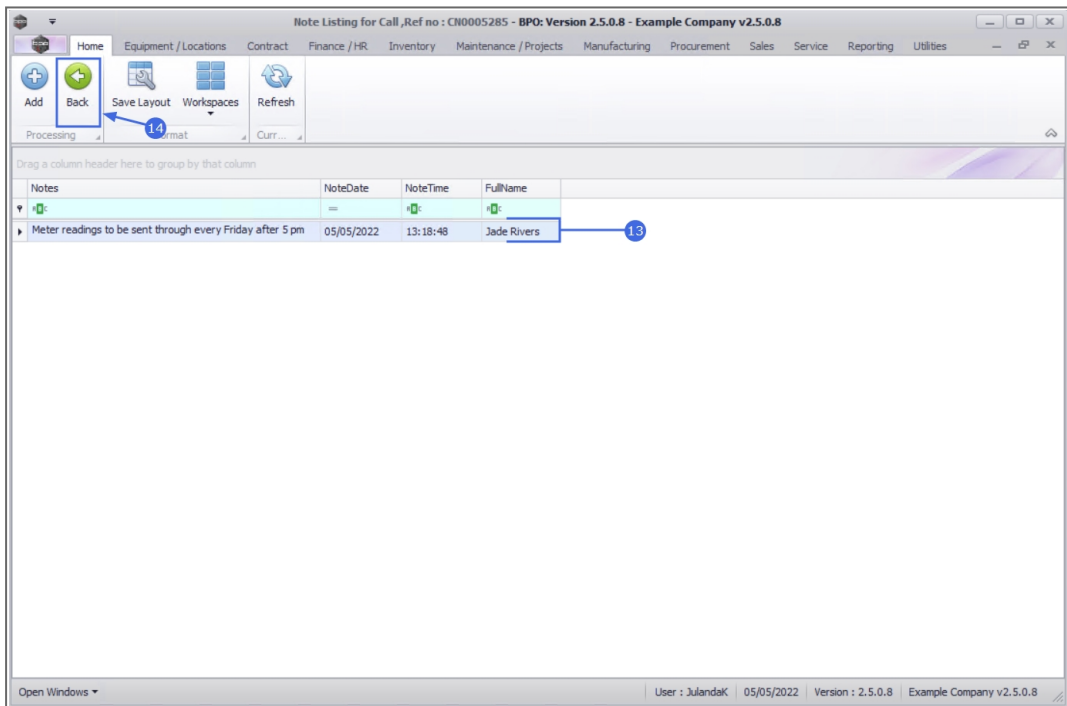
- **Note has been added to Call: [call ref number].**

14. Click on **OK**.



13. The note details can now be **viewed** from this screen.

14. Click on **Back** to return to the Call maintenance screen.





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