

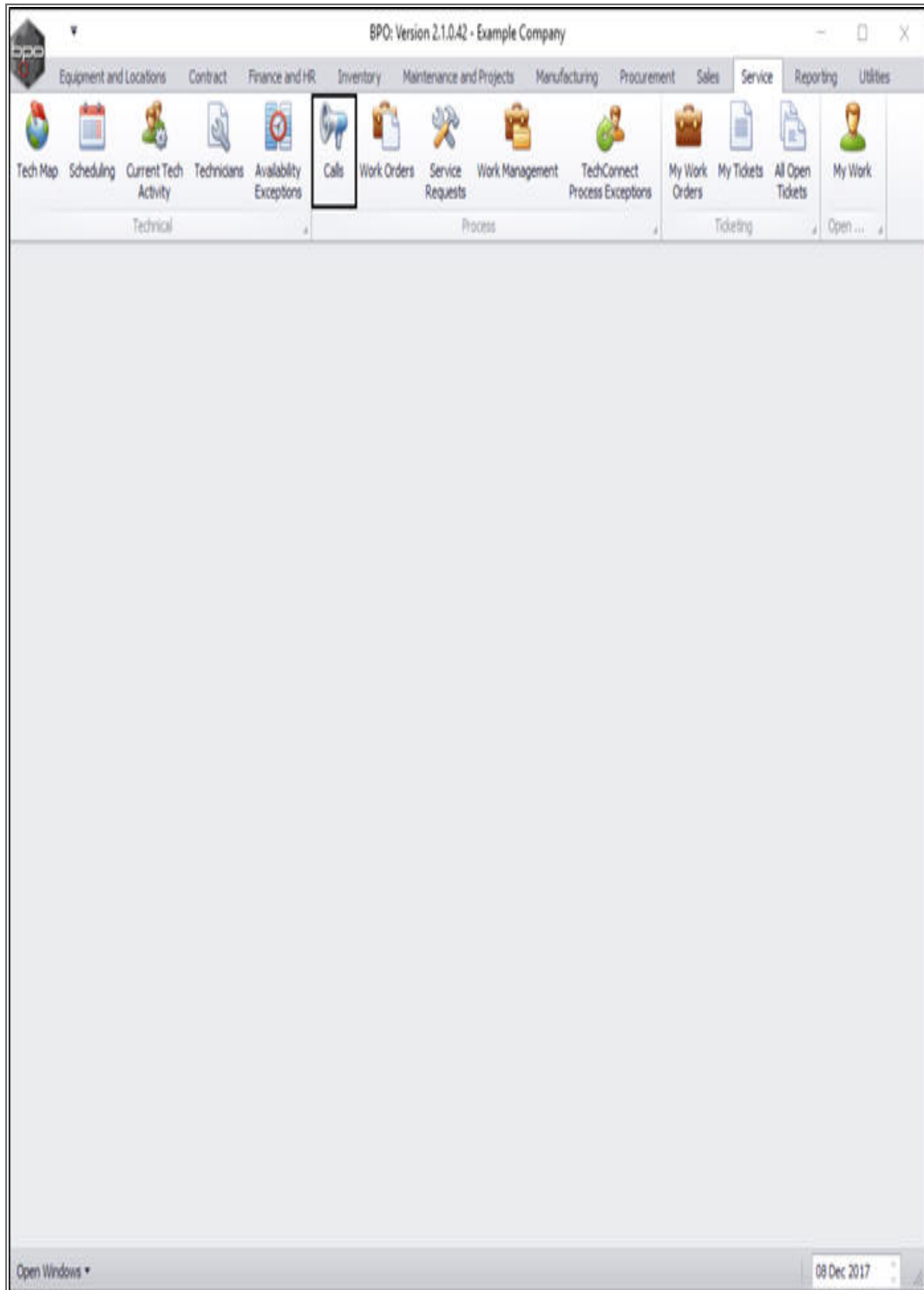
SERVICE

CALLS - ADD LABOUR TIME

If the time booked is for the same day the technician was assigned, you can just click in front of the relevant technician in the 'Time' tab and 'Edit' the record.

If the time booked is for another day, use the 'Add Record' process as explained below.

Ribbon Access: *Service > Calls*



The **Call Listing** screen will be displayed.

- Select the **site** and **status**.
 - In this image, **Durban** has been selected as the site and the status has been set to **New**.

The screenshot shows the 'Call Listing' application interface. The top menu includes Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The toolbar contains icons for Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area displays a table of call records. On the left, a filter sidebar is open, showing a tree view of sites and statuses. 'Durban' is selected under 'Information', and 'New' is selected under 'Status'. The main table displays a list of call records with columns for CallReference, CalDate, CalTime, Description, CallType, CallTypeDesc, StatusDesc, CalState, Technician, and SerialNo.

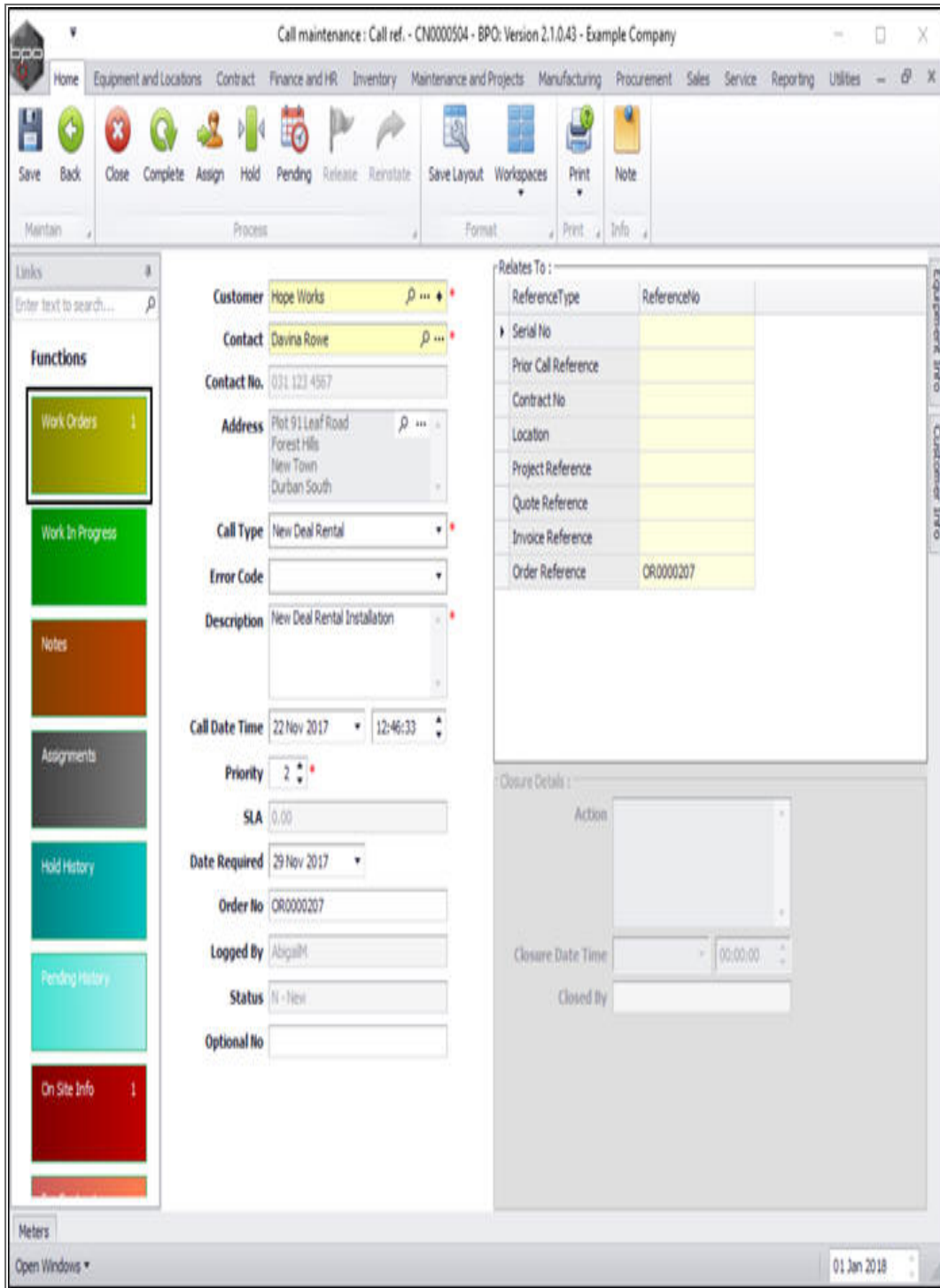
CallReference	CalDate	CalTime	Description	CallType	CallTypeDesc	StatusDesc	CalState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throu...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-10
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per ...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	an123
CH0000493	15 Jun 2017	12:28:25	Test OriSte Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INVT	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-8529
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-8529
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		tes0978
CH0000474	25 May 2017	08:40:54	Installation at client site	INVT	Installation	New	UnAssigned		18-3020
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-8529
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

- Click on the **row selector** in front of the **call** you wish to **log labour time** to.
- Click on **Edit**.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	Serial
CH0000507	12 Dec 2017	13:17:05	Paper not feeding through r...	REP	Repair	New	UnAssigned		2020
CH0000504	22 Nov 2017	12:46:33	New Deal Rental Installation	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and return...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - inter...	PR	Parts Require...	New	UnAssigned		2020
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to asset ...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-96
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per WO	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call per ...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	sin12
CH0000493	15 Jun 2017	12:28:25	Test OnNote Totals for Pric...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with the ...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:15	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-85
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Require...	New	UnAssigned		20-85
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	28 May 2017	15:03:59	Test saving a call linked to a ...	PR	Parts Require...	New	UnAssigned		14-96
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - Fault...	PR	Parts Require...	New	UnAssigned		2020
CH0000475	25 May 2017	09:18:05	Swap out - asset on a short ...	DR	Select Call Type	New	UnAssigned		Its19
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020
CH0000472	24 May 2017	14:38:10	Contract Service Test v2.1.0.5	SERV	Service	New	UnAssigned		2020
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request for ...	REP	Repair	New	UnAssigned		20-85
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1.0.5	REP	Repair	New	UnAssigned		20-85

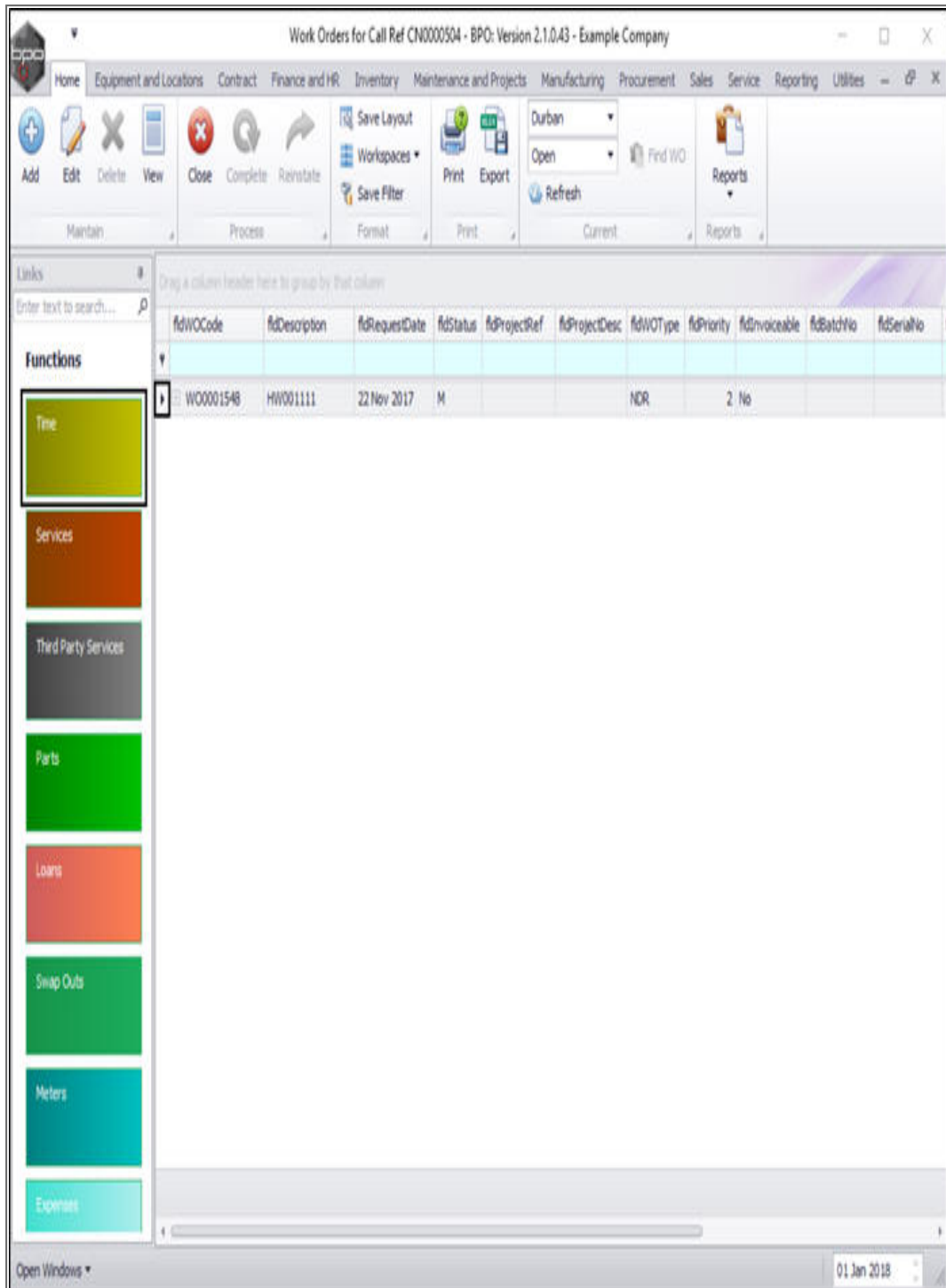
The **Call maintenance screen: Call ref. - []** screen will be displayed.

- Click on the **Work Orders** tile.



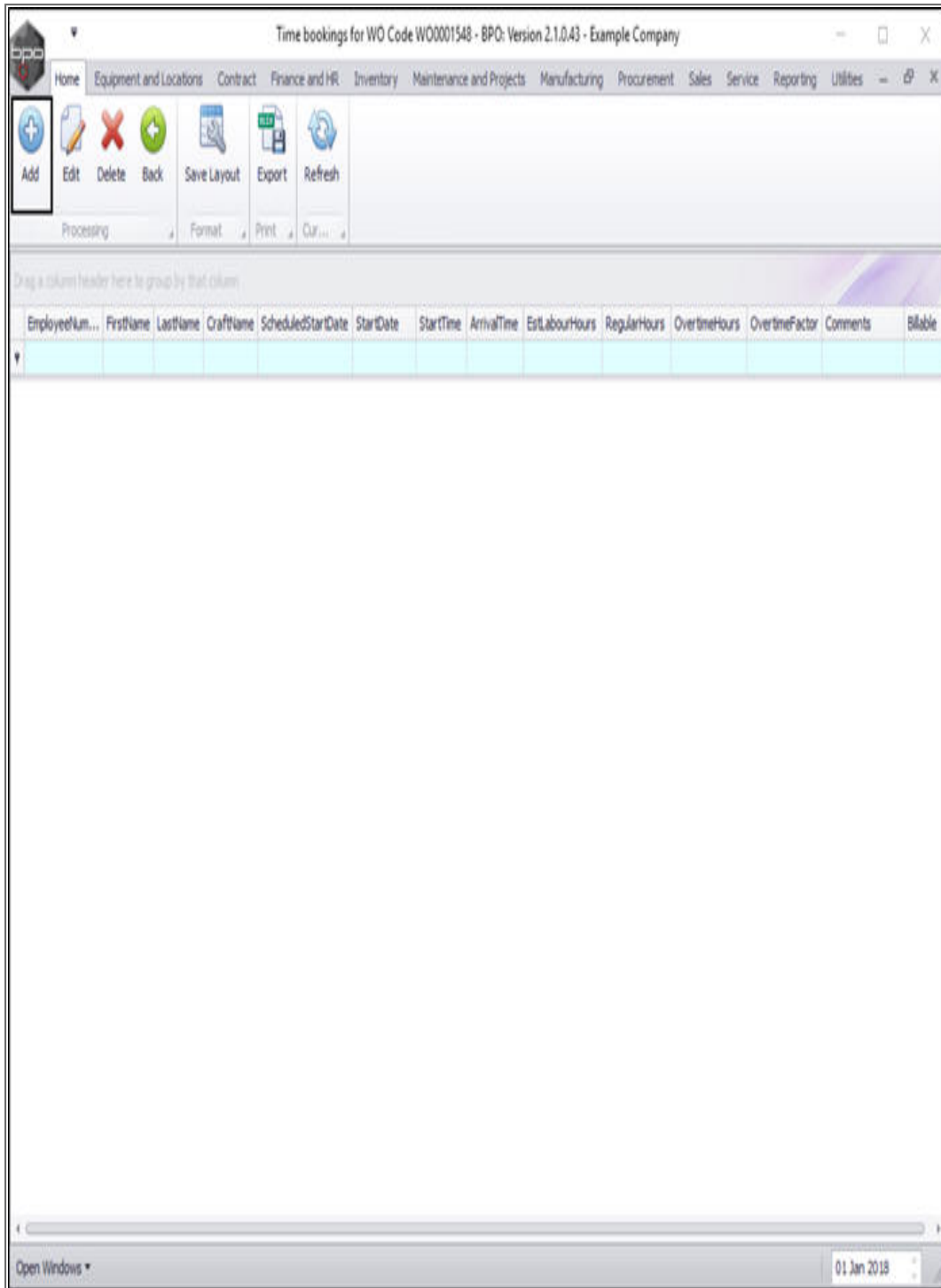
The **Work Orders for Call Ref []** screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to **log labour time** to.
- Click on the **Time** tile.



The ***Time Bookings for WO Code []*** screen will be displayed.

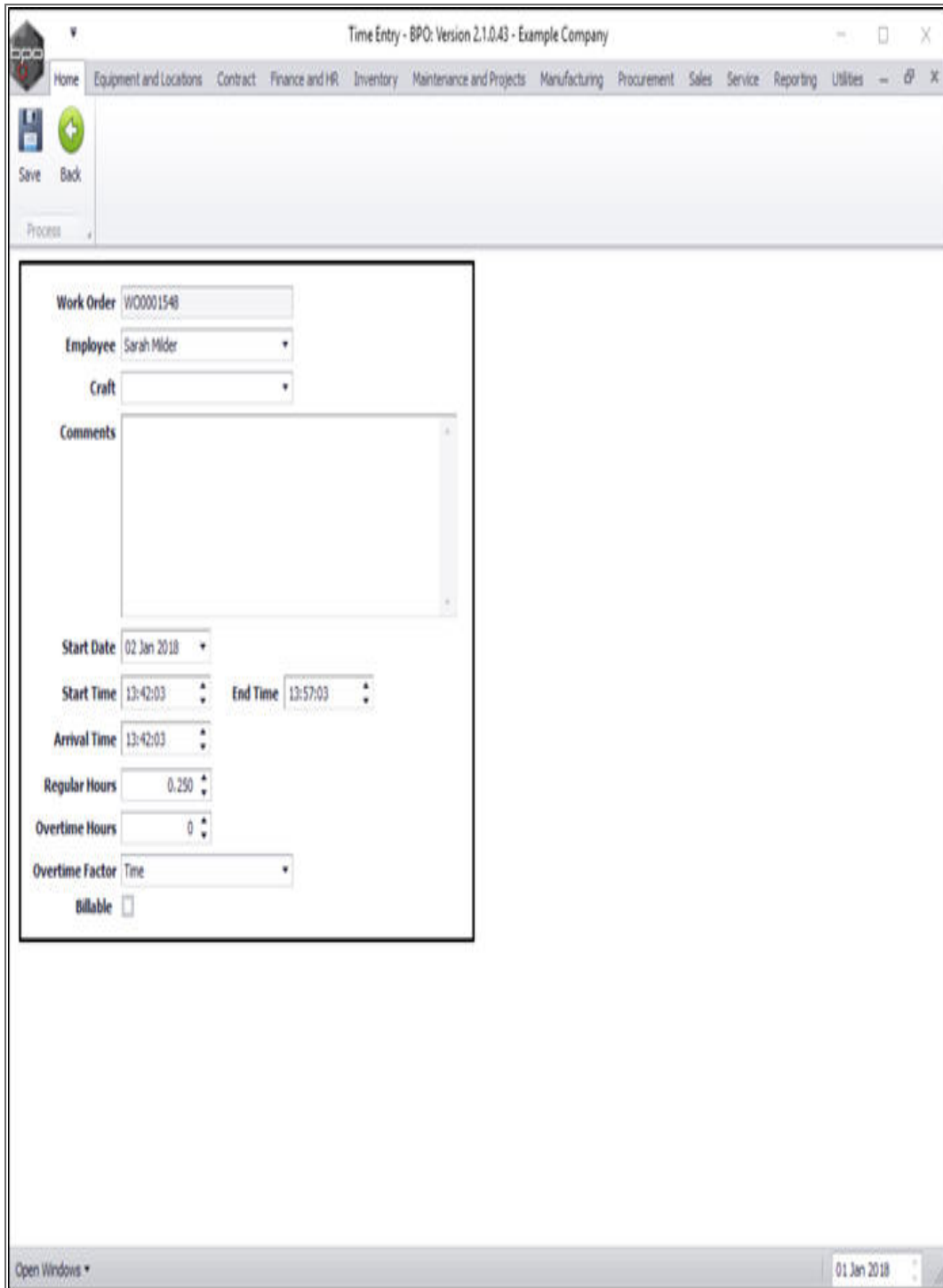
- Click on ***Add***.



The **Time Entry** screen will be displayed.

- **Work Order:** This will auto populate according to the work order initially selected.
 - **Employee:** This will auto populate with the name of the person currently logged on to the system but you can click on the drop down arrow and select an alternative employee from the menu as required.
 - **Craft Name:** Click on the drop down arrow and select a craft from the menu. The menu will only have selections relating to the crafts of the employee selected above.
 - **Comments:** Type in the work done for the hours logged.
 - **Start Date:** This will default to the current date. Click on the drop down arrow and use the calendar function to select an alternative date if required.
 - **Start Time, End Time and Arrival Time:** These will all be set to 12:00 am by default, type in or use the arrow indicators to change to the correct times.
 - **Regular hours:** If the Start and End Times are entered, the system will calculate this, otherwise, type in or use the arrow indicators to select the amount.
 - **Overtime Hours:** Type in or use the arrow indicators to record any overtime hours.
 - **Overtime Factor:** Click on the drop down arrow, and select the overtime factor.
 - **Billable:** Select this check box if the service is billable.
-
- **Note:** This will be set to billable by

default, unless the service is linked to the contract as an inclusion.



Time Entry - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

Work Order: W00001548

Employee: Sarah Milder

Craft:

Comments:

Start Date: 02 Jan 2018

Start Time: 13:42:03 End Time: 13:57:03

Arrival Time: 13:42:03

Regular Hours: 0.250

Overtime Hours: 0

Overtime Factor: Time

Billable:

Open Windows 01 Jan 2018

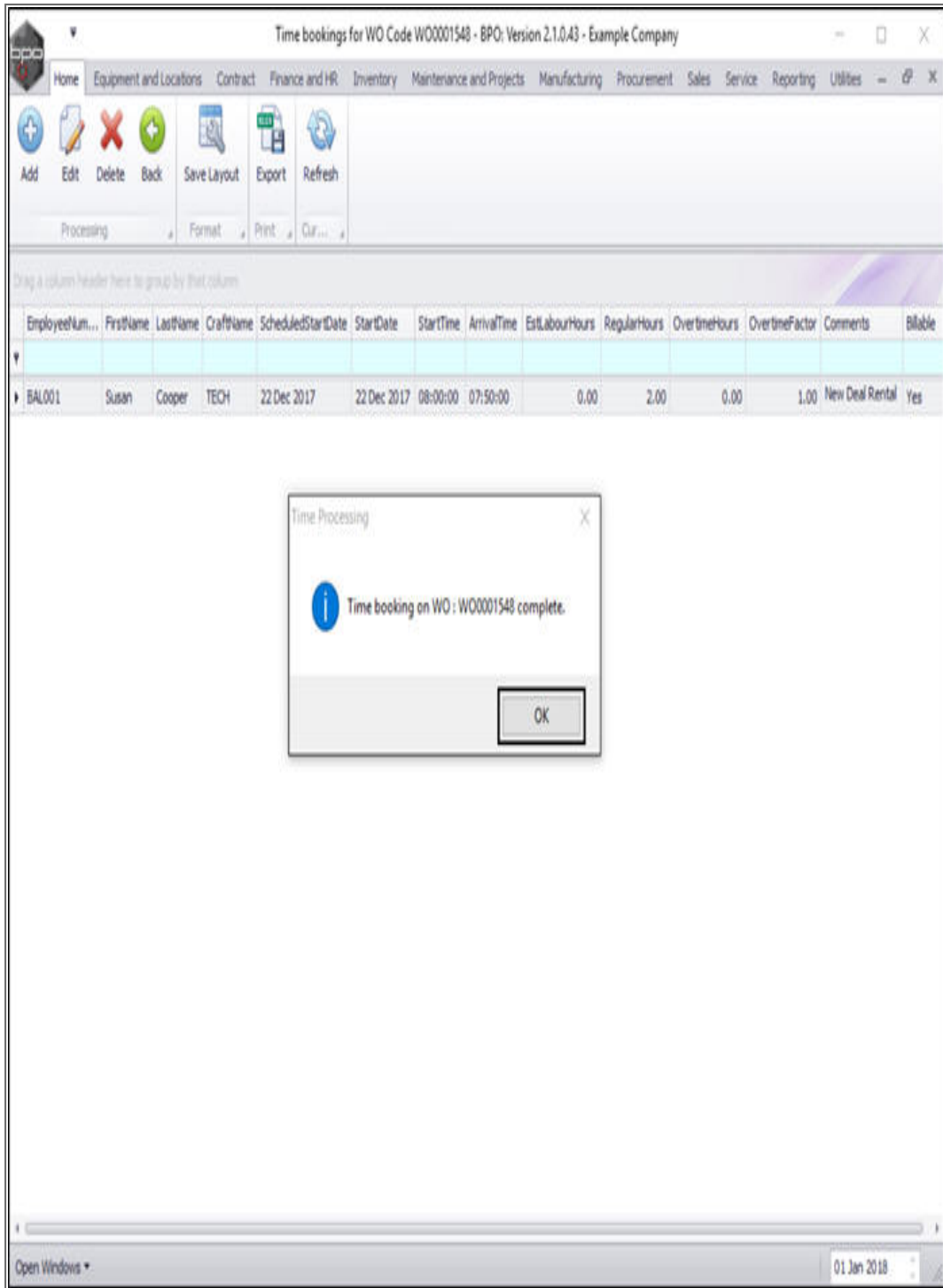
- When you have finished editing the Time Entry screen, click on **Save**.

The screenshot shows a software window titled "Time Entry - BPO: Version 2.1.0.43 - Example Company". The window has a menu bar with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with a "Save" button (highlighted with a red box) and a "Back" button. The main content area contains the following fields:

- Work Order: WO0001548
- Employee: Susan Cooper
- Craft: TECH
- Comments: New Deal Rental Installation completed.
- Start Date: 22 Dec 2017
- Start Time: 08:00:00
- End Time: 10:00:00
- Arrival Time: 07:50:00
- Regular Hours: 2.000
- Overtime Hours: 0
- Overtime Factor: Time
- Billable:

At the bottom of the window, there is a status bar with "Open Windows" on the left and "01 Jan 2018" on the right.

- You will return to the ***Time Bookings for WO Code []*** screen.
- A ***Time Processing*** message box will pop up informing you that;
 - ***Time Booking on WO: [] complete.***
- Click on **OK**.



- You can now view the newly logged labour time in this screen.

Time bookings for WO Code W00001548 - BPO: Version 2.1.043 - Example Company

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

Add Edit Delete Back Save Layout Export Refresh
 Processing Format Print

Drag a column header here to group by that column

EmployeeNum...	FirstName	LastName	CraftName	ScheduledStartDate	StartDate	StartTime	ArrivalTime	EstLabourHours	RegularHours	OvertimeHours	OvertimeFactor	Comments	Billable
BAL001	Susan	Cooper	TECH	22 Dec 2017	22 Dec ...	08:00:00	07:50:00	0.00	2.00	0.00	1.00	New Deal Rental	Yes

Open Windows | 01 Jan 2018

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