

## SERVICE

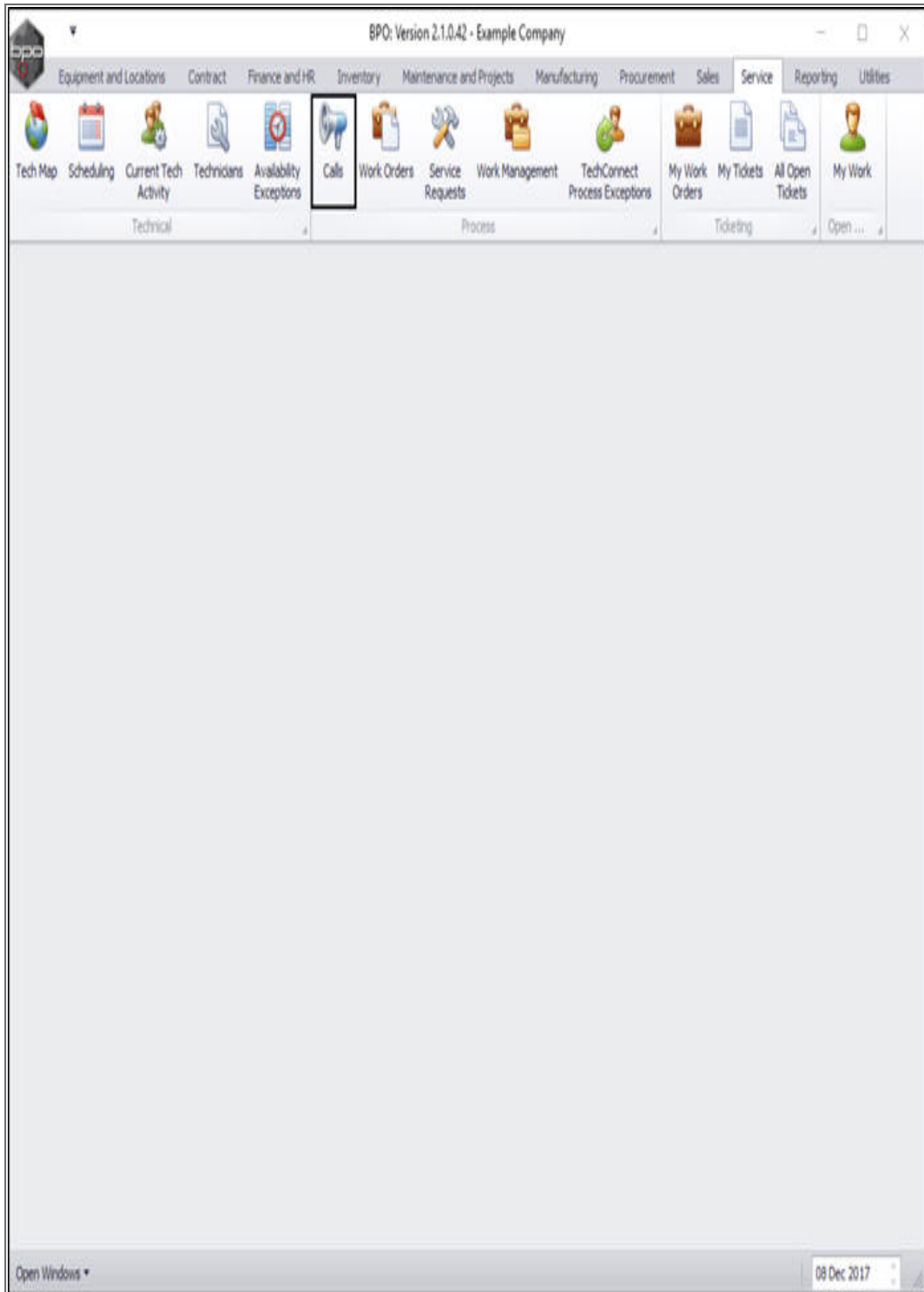
### **CALLS - UPDATE THIRD PARTY SERVICE COST**

The cost of **Third Party Services** procured should be updated on the **Call**, especially if you wish to invoice the client for the service.

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**Ribbon Access:** *Service > Calls*

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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**.

Call Listing - 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

22 May 2017 Default Save Layout My Call Close Complete Hold Pending Release Print Reports

22 Dec 2017 Refresh My Calls Workspaces Save Filter Start

Find Filter

Information No Of Calls

- Durban 48
- New 23
- In Progress 7
- Hold 3
- Pending 1
- Complete 10
- All 48
- Pretoria 0
- New 0
- In Progress 0
- Hold 0
- Pending 0
- Complete 0
- All 0

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

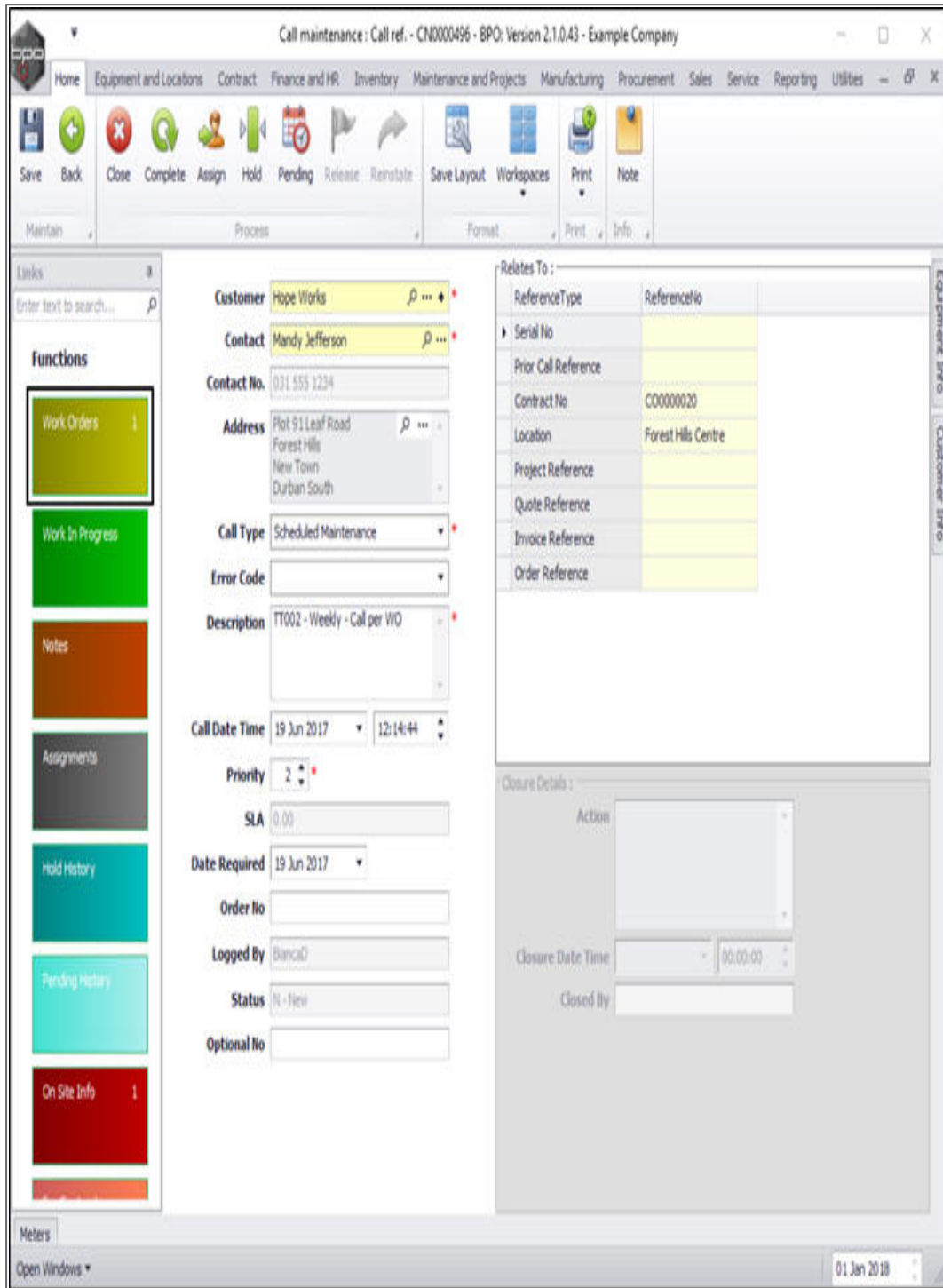
Open Windows 01 Jan 2018

- Click on the **row selector** in front of the **call** you wish to **update** the **third party service cost** of.
- Click on **Edit**.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	New Deal Rental Instal...	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 Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Cal p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	in123
CH0000493	15 Jun 2017	12:28:25	Test OriNote 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...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	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 locaton.	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	Instalaton at dent site	INST	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

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

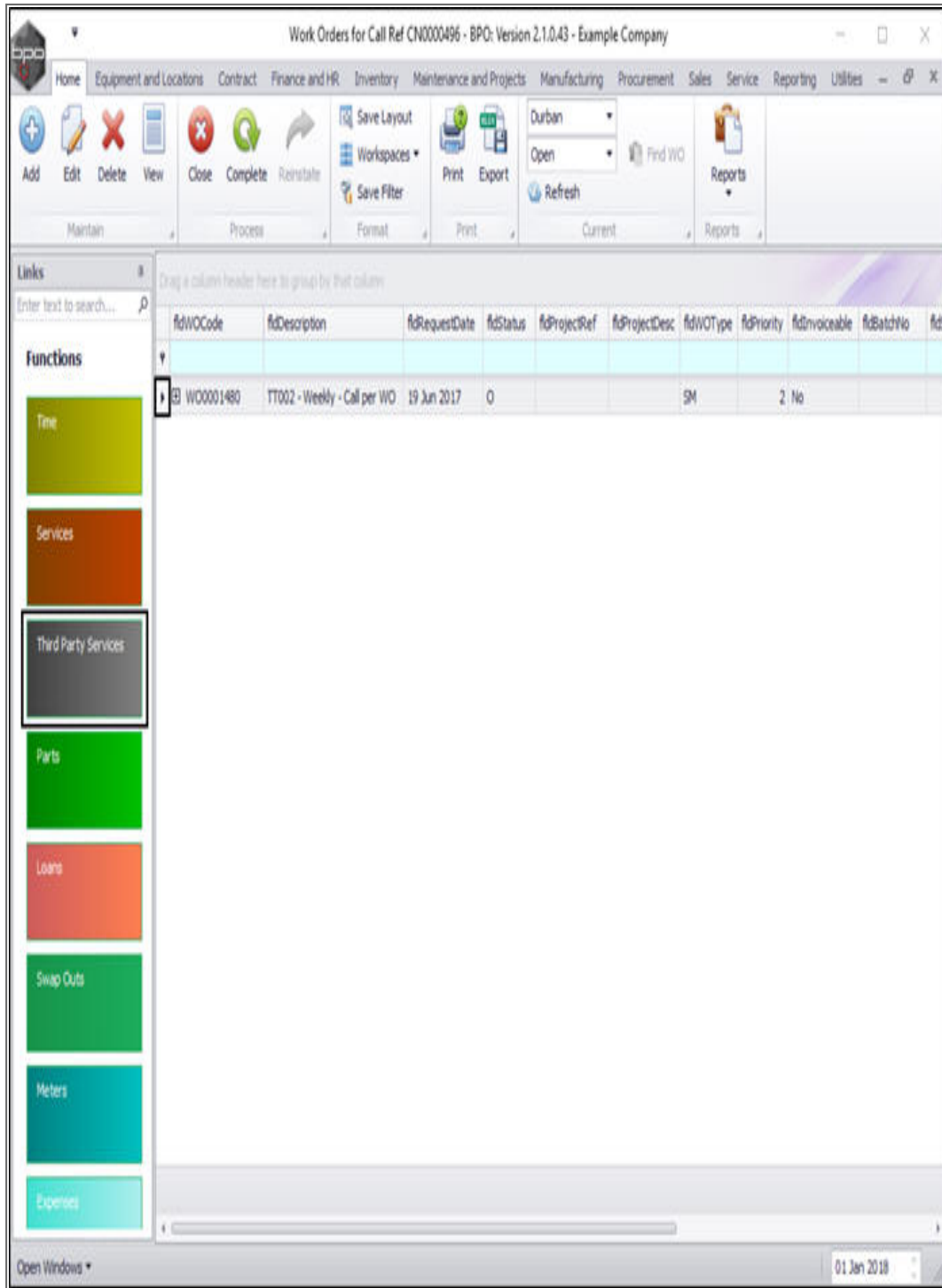
- Click on the **Work Orders** tile.



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 **update** the **third party service cost** of.
- Click on the **Third Party Services** tile.





The ***Service Requests for WO Code [ ]*** screen will be displayed.

- Select the **row** of the service request where you wish to **update** the **cost**.
- Click on **Edit**.

Service Requests for WO Code WO0001480 - 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

Add Edit Delete Back Save Layout Workspaces Requisition Billable Durban Refresh Export

Maintenance Format Process Current Print

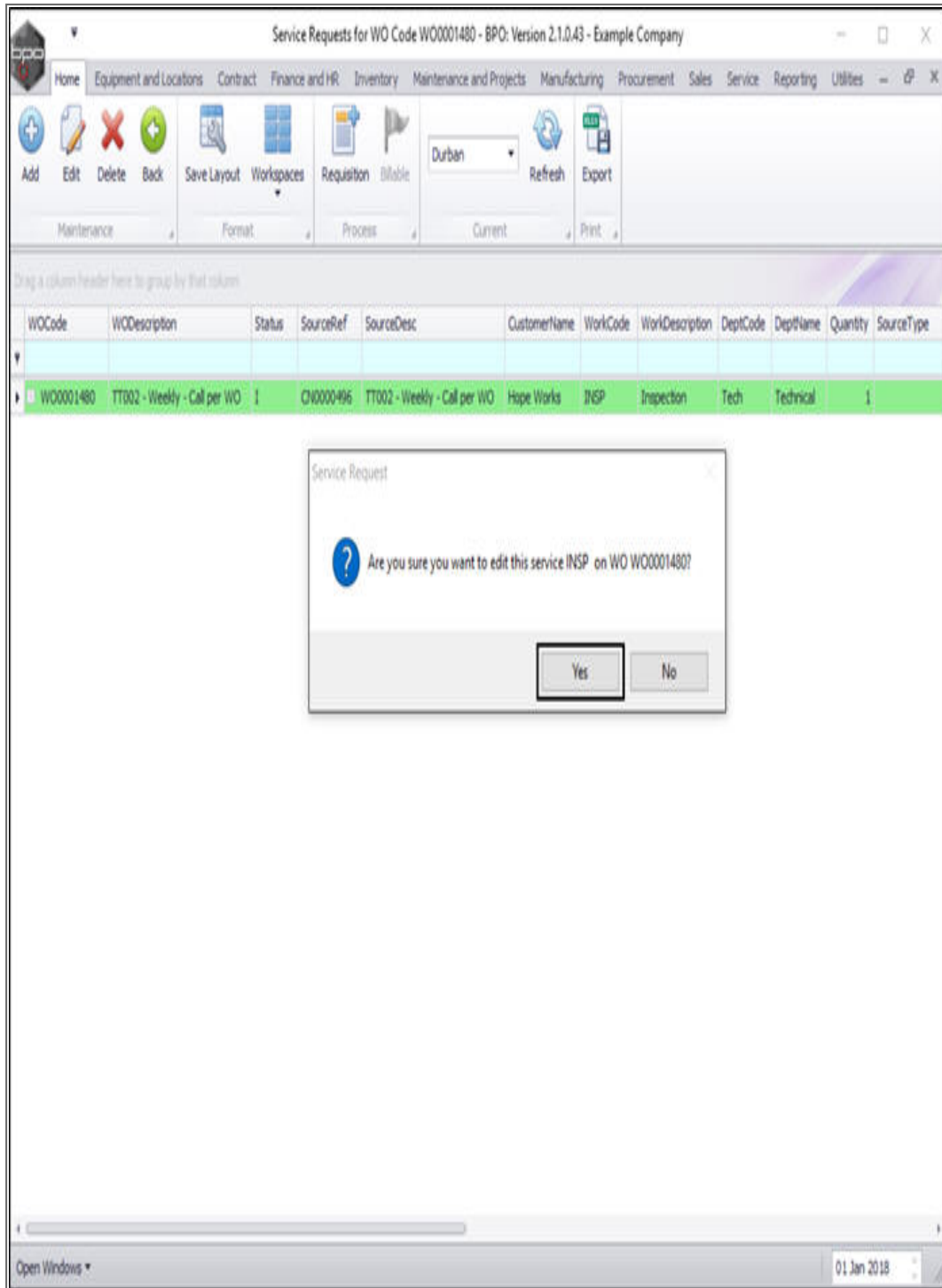
Drag a column header here to group by that column

WCode	WDescription	Status	SourceRef	SourceDesc	CustomerName	WorkCode	WorkDescription	DeptCode	DeptName	Quantity	SourceType
WO0001480	TT002 - Weekly - Call per WO	1	CH0000496	TT002 - Weekly - Call per WO	Hope Works	JTSP	Inspection	Tech	Technical	1	

Open Windows 01 Jan 2018

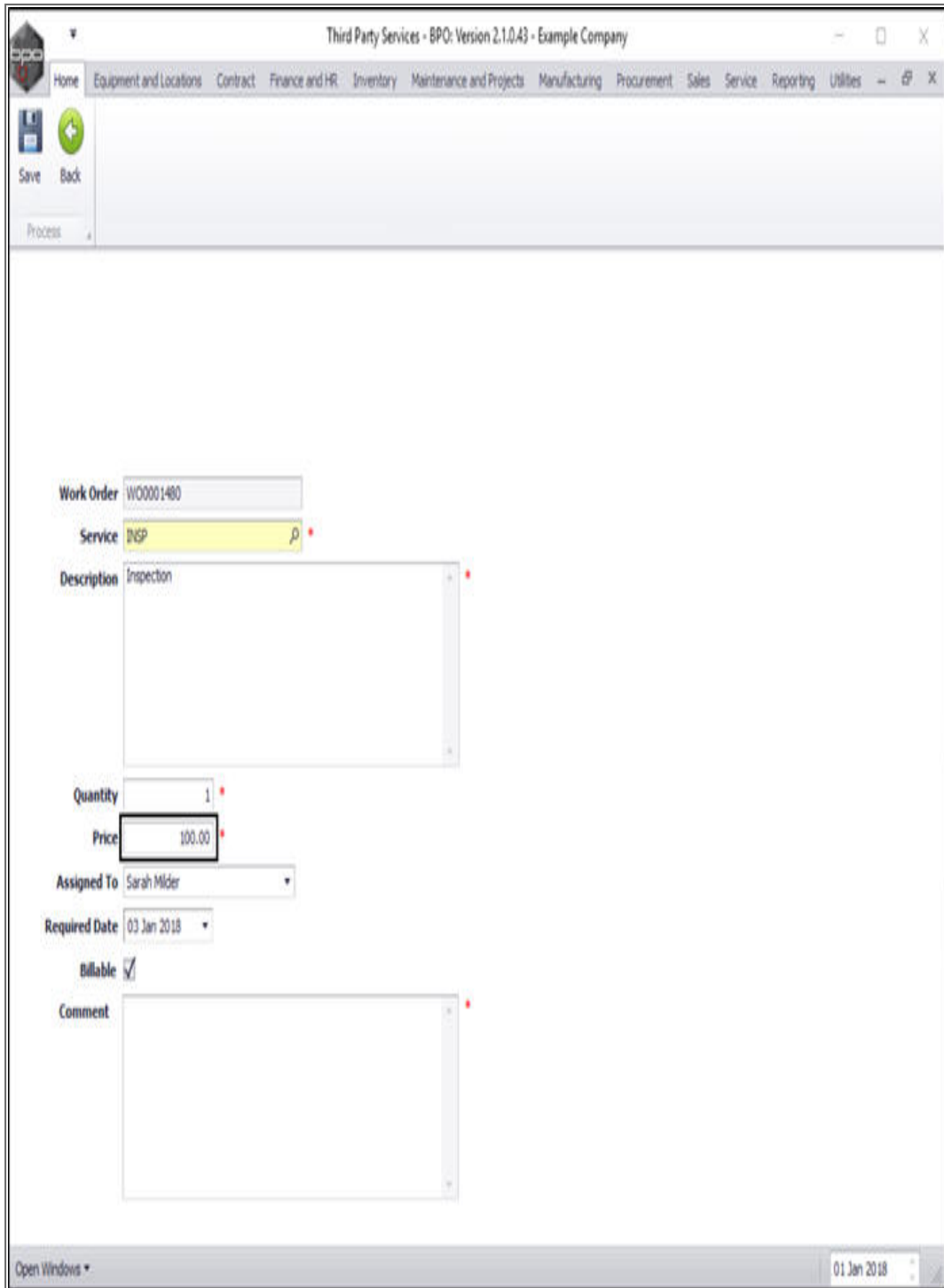


- A ***Service Request*** message box will pop up asking;
  - ***Are you sure that you want to edit this service [ ] on WO [ ]?***
- Click on **Yes**.



The **Third Party Services** screen will be displayed.

- The **Price** field has been highlighted to be changed.



The screenshot shows a software window titled "Third Party Services - BPO: Version 2.1.0.43 - Example Company". The interface includes a top navigation bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar are buttons for Save, Back, and Process. The main form area contains the following fields:

- Work Order: WO0001480
- Service: INSP (highlighted in yellow)
- Description: Inspection
- Quantity: 1
- Price: 100.00 (this field is highlighted with a black box)
- Assigned To: Sarah Milder
- Required Date: 03 Jan 2018
- Billable:
- Comment: (empty text area)

At the bottom of the window, there is an "Open Windows" button and a date indicator "01 Jan 2018".

- Type in the updated price of the third party service.
- Click on **Save**.

- **Note:** Billable: This will be set to billable by default, unless the service is linked to the contract as an inclusion.

Third Party Services - 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 WC0001480

Service INSP

Description Inspection

Quantity 1

Price 250.00

Assigned To Sarah Milder

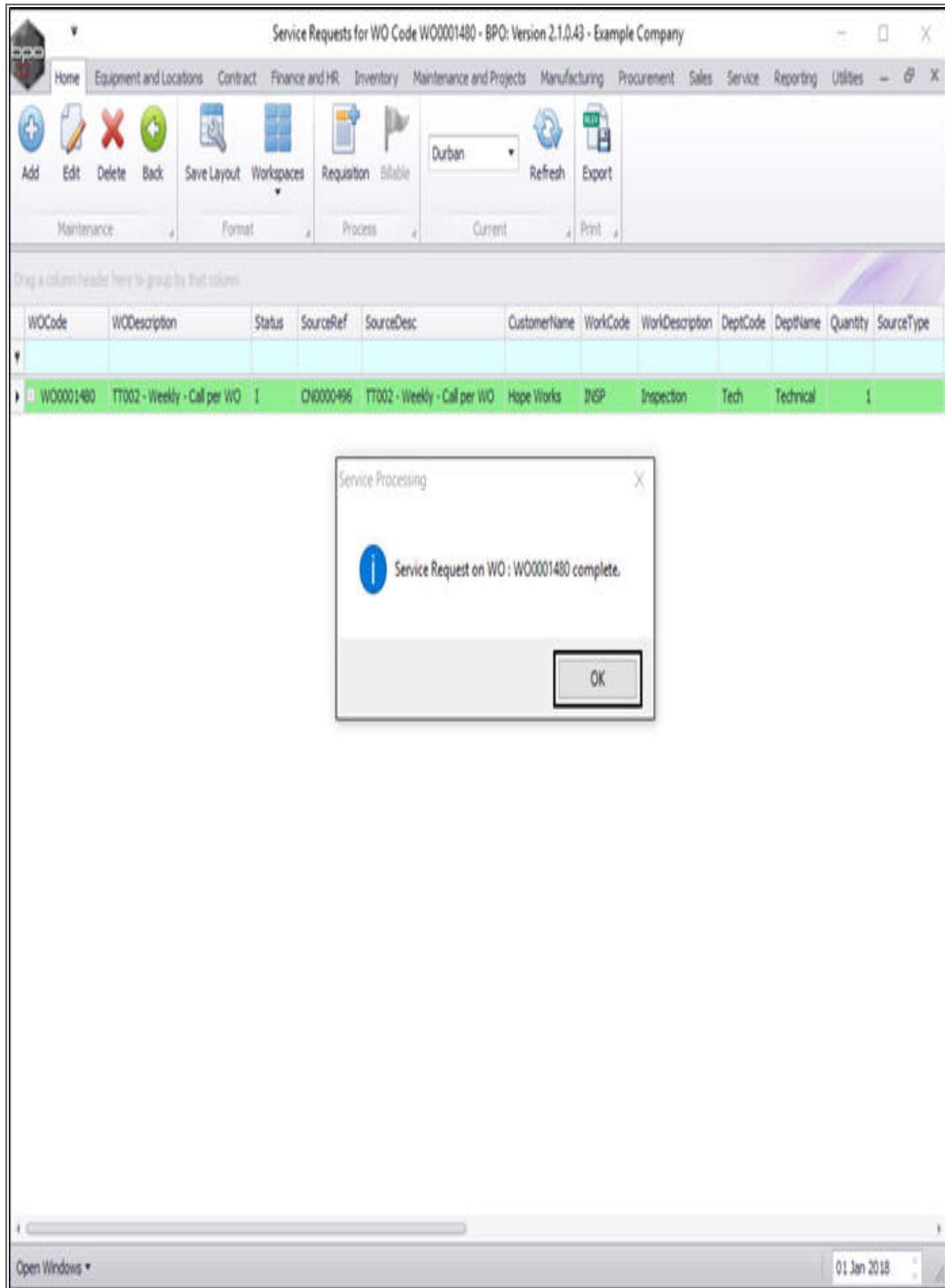
Required Date 03 Jan 2018

Billable

Comment

Open Windows 01 Jan 2018

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



- You can now view the updated third party details in this screen.
- **Scroll right** in the row to view the updated **Total Cost** figure.



Service Requests for WO Code W00001480 - 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

Add | Edit | Delete | Back | Save Layout | Workspaces | Requisition | Billable | Durban | Refresh | Export

Maintenance | Format | Process | Current | Print

Drag a column header here to group by that column

Bus	RequestorName	RequiredDate	AssignedTo	AssignedToEmpId	AssignedToName	EstimatedPrice	TotalCost	ActualCost	Billable	Comments
Required	Sarah Milder	03 Jan 2018	24 ML001	Sarah Milder	250.00	<u>250.00</u>	0.00	Yes		

Open Windows | 01 Jan 2018

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