



SERVICE

CALLS - START WORK

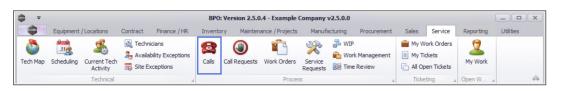
You can begin the **Start Work** process from the <u>Call Listing</u> screen in BPO. From here you can **Start** and **End** work on the Calls you are working on.

You or the Call Centre, can start work on behalf of a Technician, but the Technician will need to end work for themselves.

A Call must be in the <u>New</u> status to enable **Start Work**. It will then move to the **In Progress** status where you can continue the process until End Work.

If a technician is using Tech Connect, then he can Start Work on the Call from his device.

Ribbon Access: Service > Calls



- 1. The *Call Listing* screen will be displayed.
- 2. Select the *Site* the call has been logged for.
 - The example *Durban* is selected.
- 3. Ensure that the *status* has been set to *New*.
- 4. Click on the *row* of the Call you wish to start work on.

This can be an *Unassigned* call or a call where you have been assigned the *Technician*.

5. Click on Start.



Add I Maintain		/2022 -	Ref	Default Stresh My Calls	X Save Li	aces - 🍇 Assign ilter 🍄 Start		Hold Pending	Release Print Reports		
Find	O Fi	tor.				th 5 t column					
Pind	UH	ter		CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDe
			4		=	REC	RDC	REC		RDC	REC
Informa	tion	No Of Calls		E CN0005301	18/01/2022	UnAssigned	-u-	12:59:13	Replace part - current faulty	PR	Parts Reg
- 🖸 I	Durban	195	-		18/01/2022	UnAssigned		12:59:13	Printer displaying error code	REP	Repair
	New	182							a contract of the second second second		A CONTRACTOR OF A
1	In Progress	2			18/01/2022	UnAssigned		12:44:53	Paper keeps on jamming in machine	ITS	IT-Support
V (Bold	2	II!	E CN0005295	29/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	Pending	1	ш.		26/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	2MS - 2 month service	SM	Scheduled
(Complete	8	Ш.		22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
	Closed	4	Ш.		16/10/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	🕑 All	195	Ш.		15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
- 🖸		0			08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	New	0		E CN0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	In Progress				24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	B Hold	0			17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	Pending	0			16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
	Complete	0			15/09/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	Closed	0			10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	Cape Town	0		E CN0005282	03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena.	SM	Scheduled
	New	0			27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	In Progress	-		E CN0005280	26/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	Hold	0		E CN0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena.	SM	Scheduled
	Pending	0		E CN0005278	17/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	Complete	0		La Chi0003278	17/00/2021	unassigneu		08:00:00	2-15 - 2 IIIUTUTSELVICE	2011	auteutiet
0	Closed	0		Count: 18	4						
	All	0	-	4							

6. The *Time Logging Express* screen will be displayed.

START WORK DETAILS

- Employee: The employee field will populated with the person <u>currently</u> logged onto the system. Click on the down *arrow* to select an alternative employee, if required.
- **Call:** The call number and description of the selected call will populate this field. Click on the down *arrow* to select an alternative call number from the call list, if required.
- Work Order: If <u>only one</u> Work Order is linked to this call, then this field will populate with the *work order number* and *description*.
 - If <u>more than one</u> Work Order has been linked to the call, click on the down *arrow* to select the required Work Order.



- Equipment: Once the Work Order has been selected, the equipment field will populate with the *serial number* and *description* of the machine linked to the work order, if applicable.
- Location: If a functional location has been linked to the work order, then this field will populate with the location.

Note that the Work Order will be linked to either a *machine* or a *location*.

Status: The final unlabelled text box will contain a description of the current status of the work e.g. "Work not started".

PRINT WORK ORDER REPORT

- 7. Once the Work Order has been selected, you can Print the Work Order Report.
- 8. Click on *Print*.
- 9. When you receive the *Report Generation* message to confirm;
 - Do you want to print the WO report for WO[number]?
- 10. Click on Yes.



tome Equ	uipment / Locations Contra	Express - BPO: Version 2.5. tory Maintenance / Projects			Sales	Service	Reporting	Utilities		D X
o 💿 🕻	int 8									\$
Call Work Order Equipment		in Maintenance	Report Generation Do you want to pr	11		WO000622 Ne				
Open Windows 🕶			L	Jser : JulandaK	19/01/20	22 Versio	on : 2.5.0.7	Example Co	mpany v2.	5.0.7

- 11. The Work Order will display in the Reports *Preview* screen.
- 12. From the preview screen you can make cosmetic changes to the document as well as *Save*, *Zoom*, *Add a Watermark*, *Export* or *Email* the report.
- 13. Click on *Close* to return to the *Time Logging Express* screen.



🖗 Preview <	-11					_ _ X
File View Background						
		S. • ⊕ @ Q	100 % 💌 🔍 🖂	< > > {	·· • • • • • • • • •	- 13
						Î
			Work C	Order		
12	ſ		ExampleCo	mpany v2.5.0.7	,	
	5/	~ 12	Street No and	d Road Name	PO Box 1234	
		\\ \	Area		NewTown	
	<u>» Com</u>	npany Logo 🕻	City		Durban	
	S	$\sim R$	South Africa		South Africa	
	5		0000		1234	
		\sim	Reg No.: 0	000000asa4521	Fax No.: 031 12 4545	
			VATNo.: 0	000000	Tel No.: 031 123 4567	
	VO Barcode		Customer: We	stwood Dynamic	Tel No.: 031 789 4561	
				5001	Contact : Jason March	
			Area: Billable: NO		Priority: 2	
			billable. No			
S	hipping Address :	965 Barlet Str West Dunes		Call Date : Call Ref. :	29/10/2021 00:00:00 08:00 CN0005295	0
		West Duries		Location :	Checkers Centre - Hillcrest	
				Model No. :	checkers centre "hinerest	
				Error Code :		
		2345		WO Code :	WO0006229	
М	achine Location :			WO Desc:	BathBinMaint - Bathroom Bin Maintenance	
c	Contract No. :	C.O.D		Inclusions :		
S	stock Requested					
	Part Code	Part Description			Quantity	
	SP19-147K	Black Toner SP191	9		2.00000	
P	rior Issues :					
	all Ref.	Call Date	Issue	Solution	Technician	
c	N0005293	22/10/2021 00:00:00	BathBinMaint - Bathroom Bin Maintenance		Julanda Kessler	
c	N0005290	15/10/2021	BathBinMaint - Bathroom Bin			-
D						1000/ 0
Page 1 of 1						100% 🗩 🕕 🕀

START WORK

- 14. From the *Time Logging Express* screen,
- 15. Click on *Start Work*.



-	14	Time Logging Express - BPO	Version 2 E 0 7 - Evample Con	020041/2 E 0 7		
	ipment / Locations Contra				Service Reporting	Utilities – P
art rk	9					
Employee	Julanda Kessler					
Call	CN0005295 -	BathBinMaint - Bathroom Bin Maintenance	*			
Work Order	WO0006229 -	BathBinMaint - Bathroom Bin Maintenance	*			
Equipment			*			
Location	Checkers Centre - Hillcrest		*			
rk not started.			*			
n Windows 🔻			t	Jser : JulandaK 19/01/202	2 Version : 2.5.0.7	Example Company v2.5.0.7

- 16. You will return to the *Call Listing* screen.
- 17. When you receive the *Time Processing* message to confirm that;
 - Work started on work order WO[number].
- 18. Click on OK.



Add Main	Edit 19/01	ipment / Location L/2020 • L/2022 • Sta	Re	Contract Fina Default Default Stresh My Calls	Z Save	spaces 🔻 🎿 Assign Filter 🌮 Start	Projects Manufacturing Close Complete Hol Proce		nt Sales Service Reporting I Release Print Reports Print Reports	Utilities	_ &) (
() Fir	nd O Fi	lter		Drag a column head							
				CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDe
				• ID:	-	a 🗖 c	n 🗖 c	n 🗖 c	 O: 	n 🛛 c	* 0 ¢
Info	rmation	No Of Calls			18/01/2022	UnAssigned		12:59:13	Replace part - current faulty	PR	Parts Reg
- 1	🕤 Durban	195	*	E CN0005300	18/01/2022	UnAssigned		12:51:45	Printer displaying error code	REP	Repair
	New	181		E CN0005299	18/01/2022	UnAssigned		12:44:53	Paper keeps on jamming in machine	ITS	IT-Support
	In Progress		н	E CN0005294	26/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	2MS - 2 month service	SM	Scheduled
	() Hold	2	Ш		22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	Pending	1 8	Ш	E CN0005292	16/10/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	 Complete Closed 	8	Ш	E CN0005290		ocessina 🚽	X	08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
	All	195	Ш	E CN0005289	08			08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
- 1	Pretoria	0	Ш	E CN0005288	01	1.1	·	08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
	New	0		E CN0005287	24	Work started on work	order WO0006229.	08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
	In Progress	0	H	E CN0005286	17			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	🕑 Hold	0	Ш	E CN0005285	16			08:00:00	Tier - Commercial Tier Test	INST	Installation
	Pending	0	Ш	E CN0005285	15	18	ОК	08:00:00	2MS - 2 month service	SM	Scheduled
	Complete	0				10	- OK		BathBinMaint - Bathroom Bin Maintena		
	Closed	0			1070972021	onessigned		08:00:00			Scheduled
		0			03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
- 1	Cape Town	0			27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled
	New	0			26/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	In Progress				20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
	() Hold	0			17/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
	Pending	0			17/08/2021	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation
	Complete	0		G	-						
	Closed	0		Count: 18	3						
		0 .	Ŧ	4							

- 19. The Call has been *removed* from the Call Listing screen where the status is <u>New</u>.
- 20. Click on the *In Progress* status to view the call.
- 21. Note the *Call State* for the call has change to *Started Work*.



							.0.7 - Example Company				X
Hor	me Equi	oment / Locati	ons	Contract Finan	ce / HR Inve	entory Maintenance / F	Projects Manufacturing	Procureme	ent Sales Service Reporting L	Utilities	- 8 >
🕀 🍃	01/01	/2020 🔻	4	Default 🗹	Worksp		😆 🚱 🕨	4 🐻	P 😫 🛍		
Add Edit	19/01	/2022 -	Re	fresh My Calls	Save Fi		Close Complete Ho	ld Pending	Release Print Reports		
Maintain		0	tate		Format		Proce	ice.	Print Repo		
Cital I Call	4				21	-1 -1	11050	.00	a mine a report a		
Find	O Filt	ter		Drag a column heade	nere to group						
			- II	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDe
				Y 10:	-	NO:	a 🗖 c	R O C	• B ¢	R O C	* 0 ¢
Information		No Of Calls		E CN0005295	29/10/2021	Started Work	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled I
👻 💽 Durb		195	-		23/04/2020	Accepted	Sne Ndwalane	09:10:45	testing testing testing testing testing t	. ADM	Administrat
O N		181		E CN0000830	05/02/2020	Accepted	Bianca Du Toit	11:57:15	1234	IMP	Implement
	n Progress	2									
0	Complete Closed	1 8 4 195		20							
 ♀ ♀	Complete Closed All oria New New Hold Pending	1 8 4 195 0 0		29							
 ♀ ♀	Complete Closed All oria New in Progress Hold Pending Complete	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0	HINE	29							
 ♀ ♀	Complete Closed All oria New in Progress Hold Pending Complete Closed	1 8 4 195 0 0 0 0 0 0 0 0 0	(BARK)	29							
 ♀ ♀	Complete Closed All oria New in Progress Hold Pending Complete Closed All	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0		20							
 ♀ ♀	Complete Closed All oria New in Progress Hold Pending Complete Closed All e Town	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	- Internet in the second se	20							
P P C	Complete Closed All oria New Hold Pending Complete Closed All E Town New	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	(11) (11)	20							
	Complete Closed All oria New In Progress told Pending Complete Closed Closed All E Town New Yengress	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	1000	20							
P P O C O C O C O C O C O	Complete Closed All oria New New In Progress fold Complete Closed Complete Closed Llosed Llosed NII E Town New New New New New New New New New New	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		20							
	Complete Closed All All All All Pending Complete Closed All E Town New New New Closed Closed All E Town New New Closed Cl	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		20							
	Complete Closed All oria New Hold Pending Complete Closed All E Town New in Progress Hold Pending Complete	1 8 9 1 9 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0									
	Complete Closed All All New New In Progress Hold Closed Closed Complete Closed	1 8 4 195 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		20 Count: 3							

END WORK

1. To end work on a call, ensure that the Status has been set to In Pro-

gress.

- 2. Click on the *row* of the call you wish to end.
- 3. Click on *Start*.



					Call Li	sting - BPO: Version 2.5	i.0.7 - Example Compar	ny v2.5.0.7			>
-	Home Equi	ipment / Location	s	Contract Finan	ce / HR Inv	entory Maintenance /	Projects Manufacturing	Procureme	ent Sales Service Reporting	Utilities	_ & >
Add Edi Maintain	01/01		Refre	Default My Calls	Kave Li Works Save F Form	oaces 👻 💰 Assign	Close Complete Ho		Release Print Reports		6
Find	OF	lter 2	D								1
C THU				CalReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypere
				10c	=	4 0 0	10 C	n 🗖 c	·O:	a D c	
Information	n	No Of Calls	P		29/10/2021	Started Work	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena		Scheduled I
👻 💽 Du	urban	195 🔺	Ľ	E CN0000851	23/04/2020	Accepted	Sne Ndwalane	09:10:45	testing testing testing testing testing t.		Administrat
0	New	181	-	E CN0000830	05/02/2020	Accepted	Bianca Du Toit	11:57:15	1234	IMP	Implementa
0	In Progress	3	-	EI C140000030	03/02/2020	Accepted	bialica bu Toit	11.57.15	1254	1.4	Inplementa
+ 🖸 Pre	New	195 0 0									
 ✓ I Pre ② ③ ④ ③ ③ ③ ③ ③ ③ ③ ④ ● ●	etoria	0									
✓ ✓	etoria New In Progress Hold Pending Complete Closed All	0 0 0 0 0 0 0 0 0 0 0	144 cont								
 ✓ I Pre ○ 	etoria New In Progress Hold Pending Complete Closed All ape Town New In Progress	0 0 0 0 0 0 0 0 0 0 0 0 0	10000								
 ▼ 10 Pre ○ 	etoria New In Progress Hold Pending Complete Closed All New New In Progress Hold	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	10000								
 ✓ I Pre ② ③ ④ ④ ④ ④ ④ ④ ● ●	etoria New In Progress Hold Pending Conplete Closed All ape Town New In Progress Hold Pending	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	10100								
	etoria New In Progress Hold Pending Complete Closed All ape Town New In Progress Hold Pending Onese Hold	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0									
 ✓ Image: Pressure of the second secon	etoria New In Progress Hold Pending Complete Gosed All New In Progress Hold Pending Complete Gosed	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	1000	Count: 3							
 ✓ Image: Pressure of the second secon	etoria New In Progress Hold Pending Complete Closed All ape Town New In Progress Hold Pending Onese Hold	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	· · · · · · · · · · · · · · · · · · ·	Count: 3							

- 4. The *Time Logging Express* screen will display.
- 5. Click on *End Work*.

	4		> Time L	ogging Expre	ess - BPO:	Version 2.5.0	.7 - Example Con	npany v2.5.0.7					
Home Equ	ipment / Locations	Contract	Finance / HR	Inventory	Maintena	ince / Projects	Manufacturing	Procurement	Sales S	ervice Reporting	Utilities	-	e x
Start Work Process a Prin	int												6
Employee	Julanda Kessler		-										
Call	CN0005295	•	BathBinMaint - Bat	throom Bin Mair	ntenance	*							
Work Order	WO0006229	•	BathBinMaint - Bat	throom Bin Mair	ntenance	*							
Equipment						*							
Location	Checkers Centre - Hillo	rest				* *							
Work Started on work or	der WO0006229 on the	19/01/2	2022 at 16:31:11.			*							
Open Windows 🔻							1	Jser : JulandaK	19/01/2022	Version : 2.5.0.7	Example Co	mpany v2.	5.0.7



- 6. The *Close Open Work* frame will display.
- 7. Any previous work will be noted in the *Prior Work* and *Tech Comment* frames.
 - Click on a row in the Prior Work frame. The *corresponding observation* from the Technician responsible for the work, will reflect in the *Tech Comment* frame, <u>if</u> a comment was recorded.
 - The *corresponding rectification observation* from the Technician responsible for the previous call, will reflect in the Rectification Comment frame, if a comment was recorded.
 - Use the scroll bar to scroll across the Prior Work frame to view more information related to previous calls, such as the previous work date(s), the previous Technician responsible for the work order, etc.

	6	Close Open Wor	k - BPO: Versio	on 2.5.0.7 - Exam	ple Company	v2.5.0.7					x
Home Eq	uipment / Locations Contra	act Finance / HR Inventory	Maintenance	/ Projects Man	ufacturing P	rocurement	Sales Serv	ice Reporting	Utilities	_ 8	x
× 2											
End Work Save Layou	ıt										
Process A Format											
-	Julanda Kessler			Prior Work							00
		BathBinMaint - Bathroom Bin Main	. 1	Drag a column h		and the state of					
Call	CN0005295	BathbinMaint - Bathroom Bin Main	Itenance	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio	WorkDate	Te
				CN0005295	WO0006229	BathBinMain		Open	Recuircauo	01/01/1900	
Work Order	WO0006229	BathBinMaint - Bathroom Bin Main									
Equipment											
			7								
Location	Checkers Centre - Hillcrest		- Û								
Work State											
O Unresolved Clier	nt O Unresolved	O Resolved	$\langle \rangle$								
Rectification Code				•							•
Comments			*	Tech Comment							_
											-
											-
			Ψ.	Rectification Co	mment						
Work Started on work ord	er WO0006229 on the 19/01/2	2022 at 16:31:11.		-							
			v								Ψ.
Open Windows 🔻					User	: JulandaK 1	9/01/2022	Version : 2.5.0.7	Example Com	pany v2.5.0	.7



OPEN WORK DETAILS

Note that this information cannot be edited in this screen.

- **Employee:** The employee field will auto populate with the person selected on the Time Logging Express screen.
- Call: The call field will display the Call number and description.
- Work Order: This field will display the selected Work Order number and description.
- **Equipment:** The equipment field will display the serial number and description, if a machine was linked to the work order.
- **Location:** The functional location will populate this field, if a location was linked to the work order.

• •			Close Open Work - BPO:	Versi	on 2.5.0.7 - Exam	ple Company	v2.5.0.7					x
	Home Eq	uipment / Locations Contra	act Finance / HR Inventory Mainte	enance	/ Projects Manu	ifacturing Pr	ocurement :	Sales Serv	vice Reporting	Utilities	- 8	×
8	R											
End Work	Save Layou	it										
Process												\$
	Employee	Julanda Kessler			Prior Work							
	Call	CN0005295	BathBinMaint - Bathroom Bin Maintenance		Drag a column h	eader here to g	roup by that col	umn				
				~	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio		Te
w	Vork Order	WO0006229	BathBinMaint - Bathroom Bin Maintenance		► CN0005295	WO0006229	BathBinMain	0	Open		01/01/1900	
				÷								
	Equipment			*								
				Ψ.								
	Location	Checkers Centre - Hillcrest		*								
⊂ Work	Challe			Y								
	resolved Clier	nt O Unresolved	O Resolved									
Rectific	ation Code	r			4							•
	Comments				Tech Comment							-
	commence											-
												-
					Rectification Co	nment						
Work Started	d on work orde	er WO0006229 on the 19/01/2	2022 at 16:31:11.									
Open Windo	ws 🔻					User	: JulandaK 1	9/01/2022	Version : 2.5.0.7	Example Com	npany v2.5.0.	



WORK STATE

It is important to select the correct *Work State* as each selection will place the call in a different status:

Unresolved Client - This will place the call on *Hold* in the Call Centre (Refer to Calls - Place on Hold

Unresolved (Company) - This will place the call in *Pending* in the Call Centre (Refer to **Calls - Move to Pending Status**

Resolved - This will place the call in the *Complete* status in the Call Centi (Refer to **Calls - Complete a Call**

Resolved

- 1. Click on the *Resolved* radio button.
- 2. *Rectification Code:* Click on the down *arrow* to select the appropriate rectification *Reason Code* and *Description* from the options list.

The Hold reason codes are set up in Static Data in the Configurator.

- 3. *Comments:* Click in the text box to type in a *comment* related to the call rectification.
- 4. Click on *End Work*.



â -		Close Open Work - BPO:	Versid	n 2 5 0 7 - Evan	nle Company	v2507					
Home Eq	uipment / Locations Contra						Sales Ser	vice Reporting	Utilities		вx
End Work Process	ıt				-						\$
Employee	Julanda Kessler			Prior Work							
Call	CN0005295	BathBinMaint - Bathroom Bin Maintenance		Drag a column h	eader here to g	roup by that co	lumn				
			-	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio		
Work Order	WO0006229	BathBinMaint - Bathroom Bin Maintenance	*	CN0005295	WO0006229	BathBinMain	. 0	Open		01/01/19	00
Equipment			*								
Location	Checkers Centre - Hillcrest		*								
Work State O Unresolved Clier	nt O Unresolved	© Resolved		2							
Rectification Code	Serviced Machine		-	•							•
Comments	Machine service completed as	s scheduled	*	Tech Comment							*
			-	- Rectification Co	mment						
Work Started on work orde	er WO0006229 on the 19/01/2	022 at 16:31:11.	^ 	7							*
Open Windows 🕶				10	User	: JulandaK 1	9/01/2022	Version : 2.5.0.7	Example Cor	npany v2.5	i.0.7

Unresolved / Unresolved Client

The procedure for an *Unresolved* or *Unresolved Client* Call is very similar. For the purpose of the example, the Unresolved Client option will be followed.

- 1. Click on the *Unresolved* or *Unresolved Client* radio button.
 - In the example the *Unresolved Client* radio button was selected.
- 2. *Rectification Code:* Click on the down *arrow* to select the appropriate rectification *Reason Code* and *Description* from the options list.

The Hold reason codes are set up in Static Data in the Configurator.

- 3. *Comments:* Click in the text box to type in a *comment* as to the reason for call being unresolved.
- 4. Click on *End Work*.



- 5. When you receive the *Work Process* message requesting;
 - Do you wish to assign this to the next person?
- 6. Click on Yes to assign the call to the next person, or
 - select *No* to leave the call open as *Unassigned*.

		C	lose Open Work - BPO	: Versi	on 2.5.0.7 - Exam	ple Company	v2.5.0.7					x
Home Eq	uipment / Locations Contra	act Finance / H	R Inventory Main	tenance	/ Projects Manu	ufacturing Pr	rocurement	Sales Ser	vice Reporting	Utilities	- 6	×
End Work Process Format	ıt 4											\$
Employee	Julanda Kessler				Prior Work							
Call	CN0005295	BathBinMaint - B	athroom Bin Maintenance	*	Drag a column h	eader here to g	roup by that co	lumn				
				÷	ParentRef	WOCode	Description	Status	StatusDesc	Rectificatio	WorkDate	
Work Order	WO0006229	BathBinMaint - B	athroom Bin Maintenance	-	CN0005295	WO0006229	BathBinMain	0	Open		01/01/190	0
				Ŧ								
Equipment				*								
1 Work State	Checkers Centre - Hillcrest	() Resolved	*	2							
	Awaiting Scheduled Date			•	1							•
Comments	Bathroom unavailable due to	repairs required		*	Tech Comment							-
		W	ork Process 🚽	(5	×						
3				1								
			Po you wish to	assign	this to the next p	erson?						-
			-									
			5	Y	es	No						<u> </u>
Work Started on work ord	er WO0006229 on the 19/01/2	2022 at 16:31										-
Open Windows 🔻						User	: JulandaK 1	9/01/2022	Version : 2.5.0.7	Example Con	npany v2.5.0	.7 //

Assign Call

- 7. The *Call Assignment : Reference No: CN[number]* screen will be displayed.
 - Assigned To: Click on the down *arrow* to select the person you wish to assign the work order to.

Note that you can assign the work order to yourself, if required.

• **Detail:** The information linked to the work order will display in this field. Add or edit the information as required.



- Assignment Date: and Time: This will auto populate with the current date and time.
 - Date: Type in or click on the down *arrow* to use the calendar function to select an alternative date, if required.
 - **Time:** Type in or use the *arrow* indicators to select an alternative time, if required.
- Assigned By: The name of the person currently logged on to the system will display in this field. Click on the down *arrow* to select an alternative person, if required.
- Create new Work Order: Click on the check box to create a new work order to be *linked* to the call.
- Open Work Orders: All the open work orders for the call will be displayed in the open work orders frame. Click to select the relevant work order if you wish to assign the work to an existing work order.
- 8. Click on *Save*.

	7 → Call Assignment : Reference No. : CN0005295 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7
Home Equ	ajpment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities — 🗗 🗴
Save Back Save I	Layout View Cal
Process / Fo	at a View a
Assigned To	Wesley Haynes 🔹
Detail	BathBinMaint - Bathroom Bin Maintenance
	19/01/2022 16:37:55 1/anda Kessler Create new Work Order
Open Work Orders	Drag a column header here to group by that column
	WOCode Description
	V W00006229 BathBinMaint - Bathroom Bin Mainte
Open Windows 🕶	User : JulandaK 19/01/2022 Version : 2.5.0.7 Example Company v2.5.0.7 //



Unfulfilled Part Requests

- When assigning a work order, and unfilled part requests related to the call exists, then you will receive an *Input Validation* message to confirm;
 - There are completed work orders with unfilled part requests related to this call. Do you want to move these requests to the new work order?
- 10. Select Yes to move the part requests to the new work order, or
 - select *No* to complete the unfilled part requests. Refer to Work Orders - Part Requests

\$ =		Call	Assignment :	Reference N	o.:CN0005296 - BPO:Ve	ersion 2.5.0.7 - E	cample Compa	ny v2.5.0).7				x
Home Equ	ipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	x
Save Back Save L	ayout View Call												\$
Assigned To	Wesley Haynes		* *										
	BathBinMaint - Bathro be done due to the bi				uld not 🔺 *								
Assignment Date	19/01/2022 -	16:04:57	÷ •										
	Julanda Kessler	1010 1107	• •										
	Create new Work 0	order 🗹											
Open Work Orders	Drag a column heade	le I	roup by that colu Description BathBinMaint - Ba		ainte								
				Input Valida	thion I want to r	e orders with unfil nove these reque	led part request sts to the new w Yes	s related vork orde No	× to r?				
Open Windows 🕶						L	Jser : JulandaK	19/01/20	022 Versi	on : 2.5.0.7	Example Co	ompany v2.5.0.7	

- 11. The *Requests To Move* screen will display with a list of all the unfilled Part Requests.
- 12. Click to *select* the part requests you wish to *move* to the new work order.
- 13. Click on *OK*.



\$ =	Call Assignment : Reference No. : CN0005296 -	8PO: Version 2.5.0.7 - Example Company v2.5.0.7	_ D X
Home Equ	ipment / Locations Contract Finance / HR Inventory Maintenance / Pr	ojects Manufacturing Procurement Sales Service Reporting Utilities	- 8 ×
	ayout View Cal		
Process _ Form	nat 🖌 View 🖌	💀 Requests To Move 🚽 👘 🚹	_ – x
	Wesley Haynes BathBinMant - Bathroom Bin Maintenance - Bin maintenance could not be done due to the bathroom bins being damaged	Home Co Ck Back Process	~
	×	Drag a column header here to group by that column M fid Doc No fid Part Code fid Part Desc fid WO Code fid Quantity	- 10
Assignment Date	19/01/2022 - 16:04:57 +	▶ Ø PQ00005489 WO0006234 2.0000	0
Assigned By	Julanda Kessler 👻 *		
	Create new Work Order 🗹		
Open Work Orders	Drag a column header here to group by that column		
	WOCode Description WO0006234 BathBinMaint - Bathroom Bin Mainte		
Open Windows 🕶		User : JulandaK 19/01/2022 Version : 2.5.0.7 Example C	ompany v2.5.0.7

CALL PROCESSING

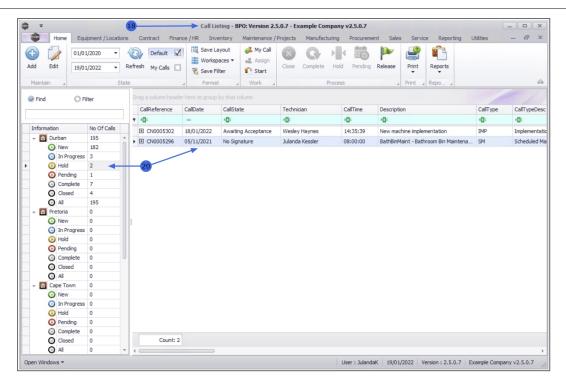
- 14. You will return to the *Time Logging Express* screen.
- 15. When your receive the *Call Processing* message to confirm that;
 - Call No: CN[number] has been assigned.
- 16. Click on *OK*.
- 17. Close the screen.



• =	1	4	Time l	ogging Expr	ess - BPO: Version 2.5.	0.7 - Example Cor	mpany v2.5.0.7					_ - x
Home Equ	ipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 😤 🗵
Start End Work Pr Work	int a										17	~
Employee	Julanda Kessler		•									
Call	CN0005274	•	PROJ406OR002		*							
Work Order	WO0006136	•	PROJ406OR002		*							
Equipment					*							
Location	Durban North											
Work Started on work or	der WO0006136 on t	he 19/01/20	022 at 16:17:30.		Call	Processing ┥	15		×			
						Call No : CN	10005274 has be	en assign	ed.			
						16		OK				
Open Windows 🕶							User : JulandaK	19/01/20	022 Vers	ion: 2.5.0.7	Example Co	mpany v2.5.0.7

- 18. You will return to the *Call Listing* screen.
- 19. The Call will no longer be in the *In Progress* status.
- 20. For an *Unresolved Client*, the call can be viewed in the *Hold* status, and the *Unresolved* call can be viewed in the *Pending* status.





MNU.122.035

Help v2.5.0.14 - Pg 19 - Printed: 25/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential