



# **SERVICE**

# **CALLS - START WORK**

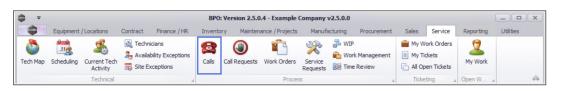
You can begin the **Start Work** process from the <u>Call Listing</u> screen in BPO. From here you can **Start** and **End** work on the Calls you are working on.

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.



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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.



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- 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.



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Page 1 of 1						100% 🗩 🕕 🕀

# **START WORK**

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



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art rk	9					
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Call	CN0005295 -	BathBinMaint - Bathroom Bin Maintenance	*			
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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.



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- 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*.



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### **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*.



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

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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
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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.

<b>•</b> •			Close Open Work - BPO:	Versi	on 2.5.0.7 - Exam	ple Company	v2.5.0.7					x
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#### 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	<b>lose Open Work</b> - 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

<b>\$</b> =		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		<b>*</b> *										
	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*.



<b>\$</b> =	Call Assignment : Reference No. : CN0005296 -	8PO: Version 2.5.0.7 - Example Company v2.5.0.7	_ <b>D</b> 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 🚽 👘 🚹	_ <b>– x</b>
	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**

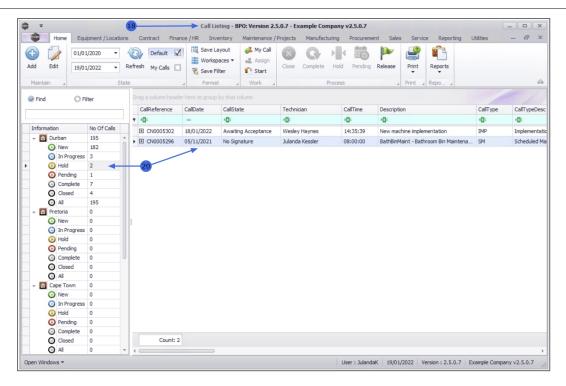
- 14. You will return to the *Time Logging Express* screen.
- 15. When your receive the *Call Processing* message to confirm that;
  - Call No: CN[number] has been assigned.
- 16. Click on *OK*.
- 17. Close the screen.



<b>•</b> =	1	4	Time l	ogging Expr	ess - BPO: Version 2.5.	0.7 - Example Cor	mpany v2.5.0.7					_ <b>- x</b>
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.





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