

We are currently updating our site; thank you for your patience.

SERVICE

INTRODUCTION TO MY WORK

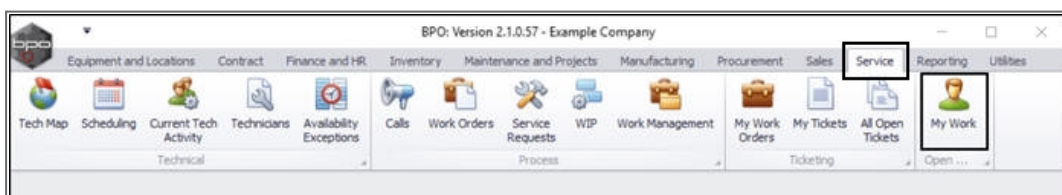
The **My Work** screen deals with work that is assigned to a **specific** employee, i.e. when I am logged in, I can only see work orders assigned to me.

This screen is very much like the call screen in that you can request parts, services and loan units; book time, travel and expenses; as well as view customer and machine detail (including warranty information).

This screen can be used by:

- a technician who does not use Tech Connect, but has access to BPO in order to log his own part requests and book his time, etc.
- anyone assigned to the work order, where a call does not exist, e.g. a work order was created to repair a machine in the workshop.

Ribbon Access: Service > My Work



THE MY WORK LISTING SCREEN

- The **My Work** Listing screen will be displayed.
- This screen lists all **open** and completed work orders assigned to the current user logged in to the system.

THE WORK ORDERS FRAME

- Click on this tab to view a list of all **work orders** assigned to the user logged in.

The screenshot displays the 'My Work - BPO: Version 2.1.0.57 - Example Company' application window. The interface includes a top navigation bar with tabs for Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a ribbon menu with various action buttons such as Add, Edit, Complete, Start, Save Layout, Workspaces, Print Call Report, Print WO, Service History, Project Progress, View Customer, Export, and Refresh. The main content area is titled 'Work Orders' and 'Work Requests'. It features a table with the following columns: WCode, WCodeDescription, SiteName, Status, WOType, WOTypeDesc, OriginRef, OriginDesc, OriginType, CustomerCode, and Custom. The table contains four rows of data:

| WCode | WCodeDescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | Custom |
|-----------|--|----------|--------|--------|-----------------|------------|----------------|------------|--------------|--------|
| WO0001592 | RSI V1.27.0.0 - Issue - Part Category mainten... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope W |
| WO0001616 | Created for production batch - test2 | Durban | O | MN | Manufacturing | | | | | |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | |

The interface also includes a status bar at the bottom with 'Open Windows' and a date/time display for '16 May 2018'.

Prior Work Orders and Work Order Technicians Frames

- In the Work Orders frame, click on a work order that has a **bold** (active) expand button in front of its row.
 - **Note:** If the expand button is **bold** as opposed to **feint** then this indicates that there is hidden content.

My Work - BPO: Version 2.1.0.57 - Example Company

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

Add | Edit | Complete | Start | Save Layout | Workspaces | Print Call Report | Print WO | Service History | Project Progress | View Customer | Export | Refresh

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

| WCode | WDescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | Custom |
|-----------|--|----------|--------|--------|-----------------|------------|----------------|------------|--------------|--------|
| WO0001592 | RSI V1.27.0.0 - Issue - Part Category mainten... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope W |
| WO0001616 | Created for production batch - test2 | Durban | O | MN | Manufacturing | | | | | |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | |

Open Windows | 16 May 2018

The **Prior Work Orders** and **Work Order Technicians** frames will be expanded.

PRIOR WORK ORDERS

- Click on the **Prior Work Orders** tab to display a list of **prior work orders** for this serial number.

My Work - BPO: Version 2.1.0.58 - Example Company

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

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

| WCode | WDescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | Sch |
|-----------|--|----------|--------|--------|-----------------|------------|----------------|------------|--------------|--------------|-----------|-----|
| WO0001592 | RSI V1.27.0.0 - Issue - Part Catego... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope Works | Technical | 19 |
| WO0001616 | Created for production batch - test2 | Durban | O | MV | Manufacturing | | | | | | | 28 |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | | | 15 |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | | | 15 |

Prior Work Orders Work Order Technicians

| SerialNo | WOType | WOTypeDesc | WCode | RequestDate | CompletionDate | CompletionTime | Description | AssignedTo | EmployeeName | Priority | Rectifica |
|----------|--------|-----------------------|-----------|-------------|----------------|----------------|------------------------------------|------------|--------------------|----------|-----------|
| 19-12345 | REP | Machine Repairs | WO0001663 | 15 May 2018 | 14 Jun 2018 | 00:00:00 | Copier to be repaired | 24 | Abigail Mhine | 2 | |
| 19-12345 | DR | Default | WO0001593 | 19 Oct 2017 | 18 Nov 2017 | 12:00:00 | Contract Closure - CO0000009 | 1 | Bianca Du Toit | 2 | |
| 19-12345 | TEST | Testing | WO0001544 | 02 Aug 2017 | 01 Sep 2017 | 12:00:00 | Warranty claim with parts only | 6 | George James ... | 2 | |
| 19-12345 | TON | Toner Required | WO0001543 | 02 Aug 2017 | 28 Nov 2017 | 12:02:02 | Toner required for machine | 6 | George James ... | 2 | Work |
| 19-12345 | DR | Default | WO0001180 | 30 Mar 2017 | 30 Mar 2017 | 09:29:35 | work order linked to an asset l... | 17 | Judith Mudzengi | 2 | Exper |
| 19-12345 | SM | Scheduled Maintenance | WO0001124 | 24 Feb 2017 | 24 Feb 2117 | 12:00:00 | TT070 - 2 Daily - Call per WO | 6 | George James ... | 2 | |
| 19-12345 | SERV | Service | WO0000963 | 06 Oct 2016 | 15 Aug 2017 | 16:07:20 | Call closure tests | 1 | Bianca Du Toit | 2 | dé sc |
| 19-12345 | TON | Toner Required | WO0000799 | 29 Mar 2016 | 08 Jun 2016 | 09:30:04 | Cyan toner required | 6 | George James ... | 2 | work |
| 19-12345 | TON | Toner Required | WO0000783 | 22 Mar 2016 | 18 Apr 2016 | 13:31:15 | Toner replacement | 6 | George James ... | 1 | work |
| 19-12345 | REP | Machine Repairs | WO0000468 | 06 Mar 2015 | 13 Aug 2015 | 15:11:14 | test | 1 | Bianca Du Toit | 2 | test |
| 19-12345 | REP | Machine Repairs | WO0000469 | 06 Mar 2015 | 05 Apr 2015 | 12:00:00 | test | 6 | George James ... | 2 | |
| 19-12345 | SERV | Service | WO0000470 | 06 Mar 2015 | 05 Apr 2015 | 12:00:00 | test | 1 | Bianca Du Toit | 2 | |
| 19-12345 | SERV | Service | WO0000471 | 06 Mar 2015 | 05 Apr 2015 | 12:00:00 | test | 7 | Carolina Suzzet... | 2 | |

Open Windows 17 May 2018

WORK ORDER TECHNICIANS

- Click on the **Work Order Technicians** tab to display a list of **technicians** linked to this work order.

My Work - BPO: Version 2.1.0.58 - Example Company

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

Add | Edit | Complete | Start | Save Layout | Workspaces | Print Call Report | Print WO | Service History | Project Progress | View Customer | Export | Refresh

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

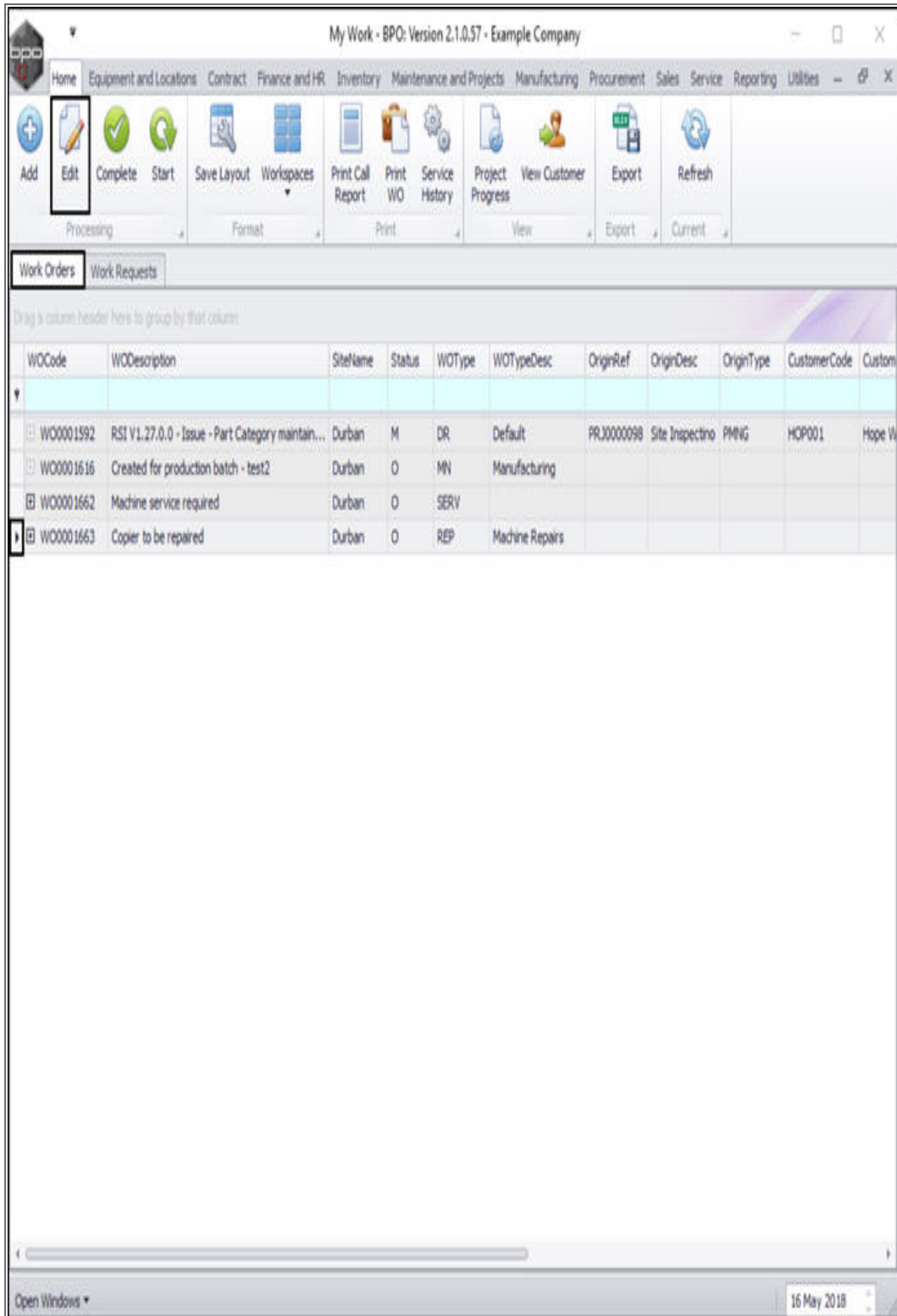
| WCode | WDescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | Sch |
|-----------|--|----------|--------|--------|-----------------|------------|----------------|------------|--------------|--------------|-----------|-----|
| WO0001592 | RSI V1.27.0.0 - Issue - Part Catego... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope Works | Technical | 19 |
| WO0001616 | Created for production batch - test2 | Durban | O | MN | Manufacturing | | | | | | | 28 |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | | | 15 |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | | | 15 |

Prior Work Orders | Work Order Technicians

Open Windows | 17 May 2018

VIEW WORK ORDER DETAILS

- Making sure that you are in the **Work Orders** frame, click on the **row selector** in front of the **work order** that you wish to view the **details** of.
- Click on **Edit**.



The **Maintain WO - Ref []** screen will be displayed. Here you can view:

1. The main work order details.
2. The call or project reference - if this work order is linked to a call or project.
3. Scheduling details.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links: Enter text to search...

Functions: Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses

1

Description: Copier to be repaired

Requestor: Abigail Mine

WO Type: Repair

Priority: 2

Request Date: 15 May 2018 10:40:28

Status: 0 - Open

Billable:

Capitalise:

Work Order Item

Functional Location: Equipment

Item: 19-12345

Comment:

2

Links:

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PRNG | Project Reference | |

3

Schedule:

Assigned To: Abigail Mine

Assigned By: Abigail Mine

Scheduled Start: 15 May 2018 10:40:29

Scheduled End: 14 Jun 2018 00:00:00

Actual Start: 14 Jun 2018 00:00:00

Actual End: 14 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

Rectification Code:

Rectification Comments:

Completion Date: 14 Jun 2018 00:00:00

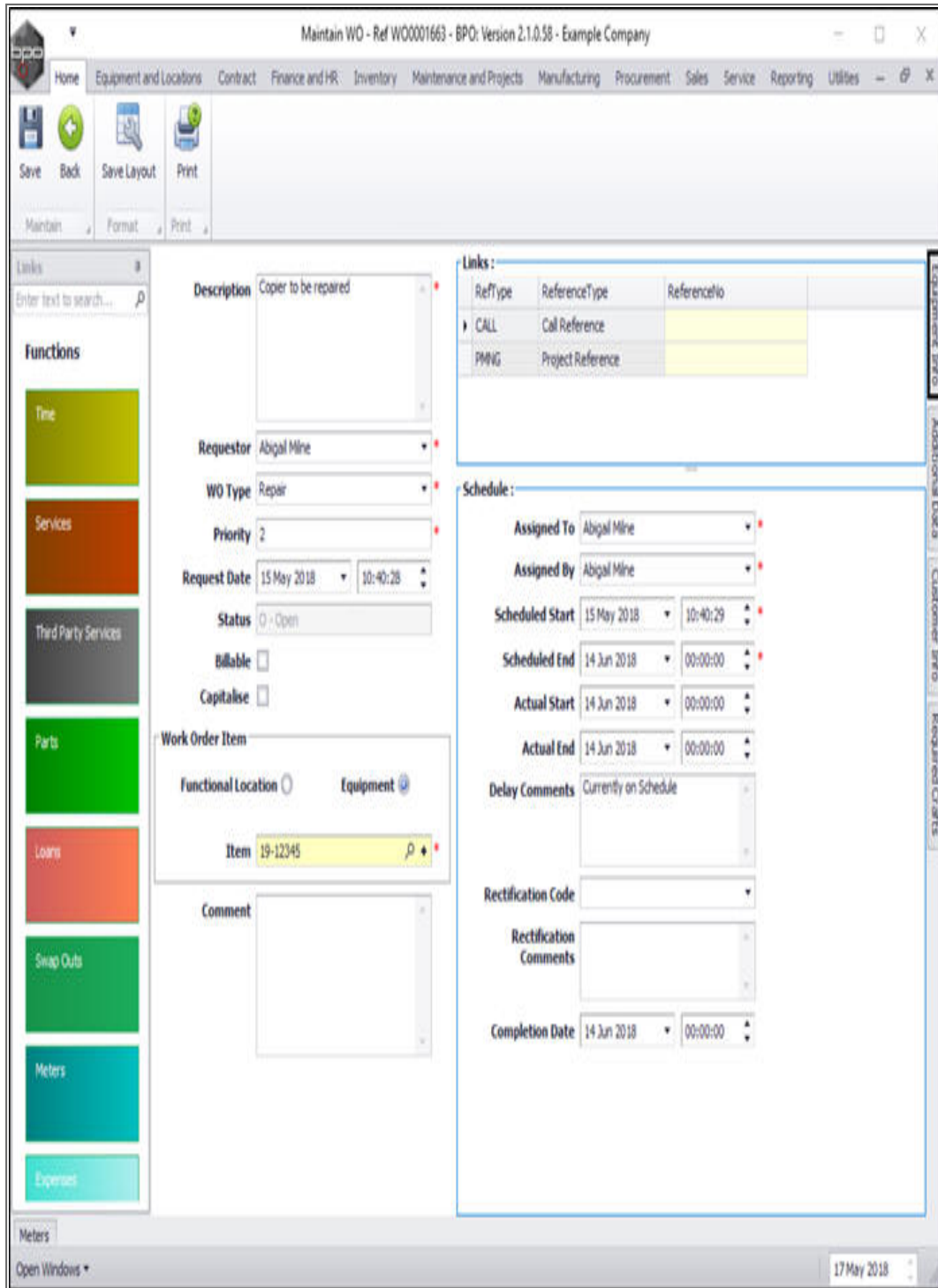
Meters

Open Windows

17 May 2018

EQUIPMENT INFO

- In the **Maintain WO - Ref []** screen, click on the **Equipment Info** tab on the right side of the screen.



The **Equipment Info** docking panel will be expanded. Here you can view:

1. Equipment Information details (e.g. part no., model no.)
2. Warranty information
3. Equipment Notes

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' window. The interface includes a top menu 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 menu is a toolbar with Save, Back, Save Layout, and Print buttons.

The main content area is divided into several sections:

- Left Panel:** Contains 'Links' (search bar), 'Functions' (Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses), and 'Meters'.
- Form Fields:**
 - Description:** Copier to be repaired
 - Requestor:** Abigail Mine
 - WO Type:** Repair
 - Priority:** 2
 - Request Date:** 15 May 2018 10:40:28
 - Status:** Open
 - Billable:**
 - Capitalise:**
 - Work Order Item:** Functional Location: Equipment, Item: 19-12345
 - Comment:** (Empty text area)
- Equipment Info:**
 - Part No:** SP1919
 - Part Desc:** SP1919 Sprint Colour MFC
 - Model No:** 1919
 - Category:** Hardware
- Warranties:**

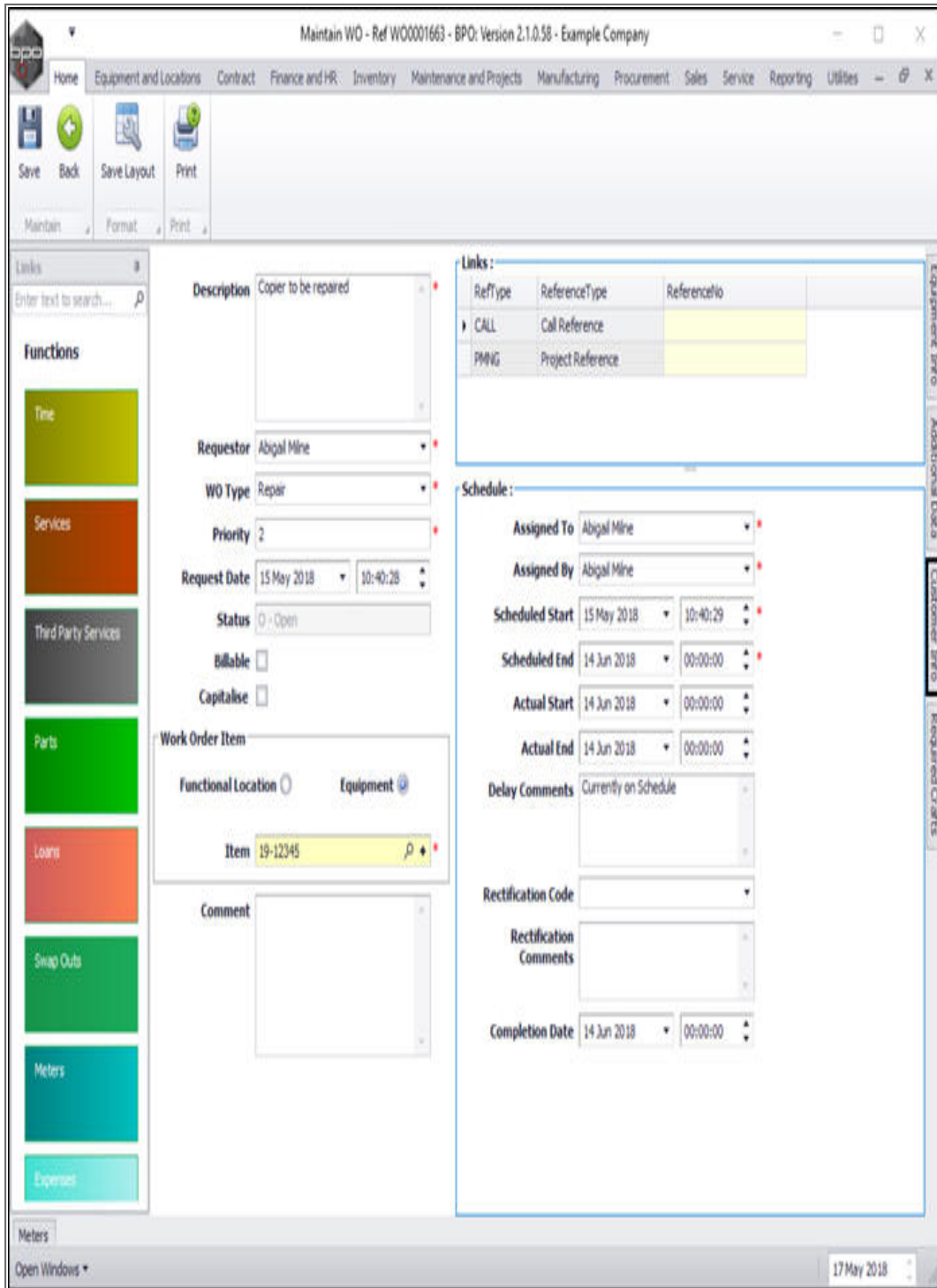
| WarrantyCode | Description | SupplierCode | SupplierName | StartDate |
|--------------|----------------------------|--------------|---------------------------|-------------|
| 24MSW | 24 Month Supplier Warranty | SPR001 | Sprint Distributors Local | 07 Apr 2014 |
- Equipment Notes:**

| Comment | Date | FullName |
|---------|-------------|-----------------|
| | 06 Mar 2015 | Bianca Du Toit |
| | 08 Apr 2014 | Belinda Sherman |

Red callout boxes with numbers 1, 2, and 3 are placed over the Equipment Info, Warranties table, and Equipment Notes table respectively.

CUSTOMER INFO

- In the **Maintain WO - Ref []** screen, click on the **Customer Info** tab on the right side of the screen.



The **Customer Info** docking panel will be expanded.

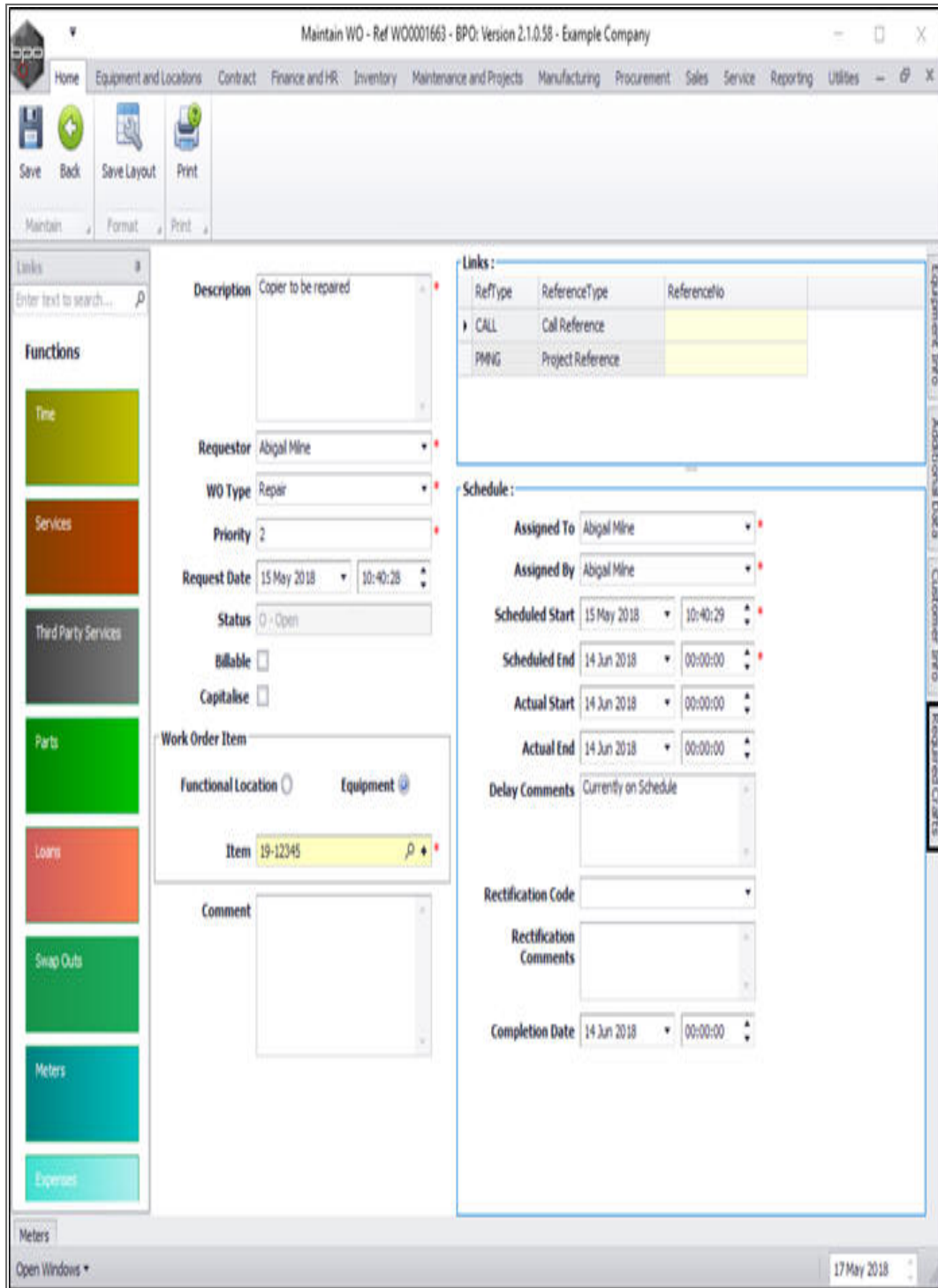
Here you can view:

1. Customer Information details (e.g. phone no., address).
2. Customer Notes

The screenshot displays a software interface for maintaining a Work Order (WO). The window title is "Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company". The interface includes a menu 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 menu is a toolbar with Save, Back, Save Layout, and Print buttons. A left sidebar contains "Links" and "Functions" (Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses). The main area is divided into sections: "Description" (Copier to be repaired), "Requestor" (Abigail Mine), "WO Type" (Repair), "Priority" (2), "Request Date" (15 May 2018), "Status" (Open), "Billable" and "Capitalise" checkboxes, "Work Order Item" (Functional Location, Equipment, Item: 19-12345), and "Comment". On the right, there are two panels: "Customer Info" and "Customer Notes". The "Customer Info" panel contains fields for Customer Code, Tel No, Contact No., Account Code, Status, VAT No, Hold Reason, Address, and Is Debtor. The "Customer Notes" panel is empty. A vertical sidebar on the far right lists "Equipment Info", "Additional Data", and "Required Credits". The bottom status bar shows "Open Windows" and the date "17 May 2018". Two blue boxes with numbers "1" and "2" are overlaid on the "Contact No." field and the "Customer Notes" panel respectively.

REQUIRED CRAFTS

- In the **Maintain WO - Ref []** screen, click on the **Required Crafts** tab on the right side of the screen.



The **Required Crafts** docking panel will be expanded.

- Here you can view a list of the **crafts** and the corresponding **labour time** and **crew size** needed to complete this work order.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

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

Save Back Save Layout Print

Links
Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Meters

Open Windows

17 May 2018

Description: Copier to be repaired

Requestor: Abigal Mine

WO Type: Repair

Priority: 2

Request Date: 15 May 2018 10:40:28

Status: Open

Billable:

Capitalise:

Work Order Item

Functional Location: Equipment

Item: 19-12345

Comment

Required Crafts

| CraftName | CraftDesc | EstLabourHours | CrewSize |
|-----------|----------------|----------------|----------|
| ADMIN | Administration | 1.00 | 1 |
| TECH | Technician | 2.00 | 1 |

ADDITIONAL DATA

- In the **Maintain WO - Ref []** screen, click on the **Additional Data** tab on the right side of the screen.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links
Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Description Copier to be repaired

Requestor Abigal Mine

WO Type Repair

Priority 2

Request Date 15 May 2018 10:40:28

Status Open

Bilable

Capitalise

Work Order Item

Functional Location Equipment

Item 19-12345

Comment

Links

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMNG | Project Reference | |

Schedule

Assigned To Abigal Mine

Assigned By Abigal Mine

Scheduled Start 15 May 2018 10:40:29

Scheduled End 14 Jun 2018 00:00:00

Actual Start 14 Jun 2018 00:00:00

Actual End 14 Jun 2018 00:00:00

Delay Comments Currently on Schedule

Rectification Code

Rectification Comments

Completion Date 14 Jun 2018 00:00:00

Meters

Open Windows

17 May 2018

Equipment Info
Additional Data
Customer Info
Required Crafts

The **Additional Data** docking panel will be expanded.

- Here you can create **customised fields** of additional data pertinent to this work order if required.

The screenshot displays the 'Maintain WO' interface for a work order with reference 'WO0001663'. The window title is 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company'. The top navigation bar includes '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', 'Save Layout', and 'Print'. A secondary bar contains 'Maintain', 'Format', and 'Print' options.

The main form area is divided into several sections:

- Description:** A text field containing 'Copier to be repaired'.
- Requestor:** A dropdown menu with 'Abigail Mine' selected.
- WO Type:** A dropdown menu with 'Repair' selected.
- Priority:** A text input field with the value '2'.
- Request Date:** A date and time selector showing '15 May 2018' and '10:40:28'.
- Status:** A dropdown menu with 'Open' selected.
- Billable:** A checkbox that is currently unchecked.
- Capitalise:** A checkbox that is currently unchecked.
- Work Order Item:** A section with radio buttons for 'Functional Location' and 'Equipment'. The 'Equipment' option is selected. Below it is an 'Item' dropdown menu with '19-12345' selected.
- Comment:** A large text area for entering notes.
- Additional Data - Custom Fields:** A section containing ten labeled input fields, 'Other1' through 'Other10', each with a placeholder text 'Field 1' through 'Field 10' respectively.

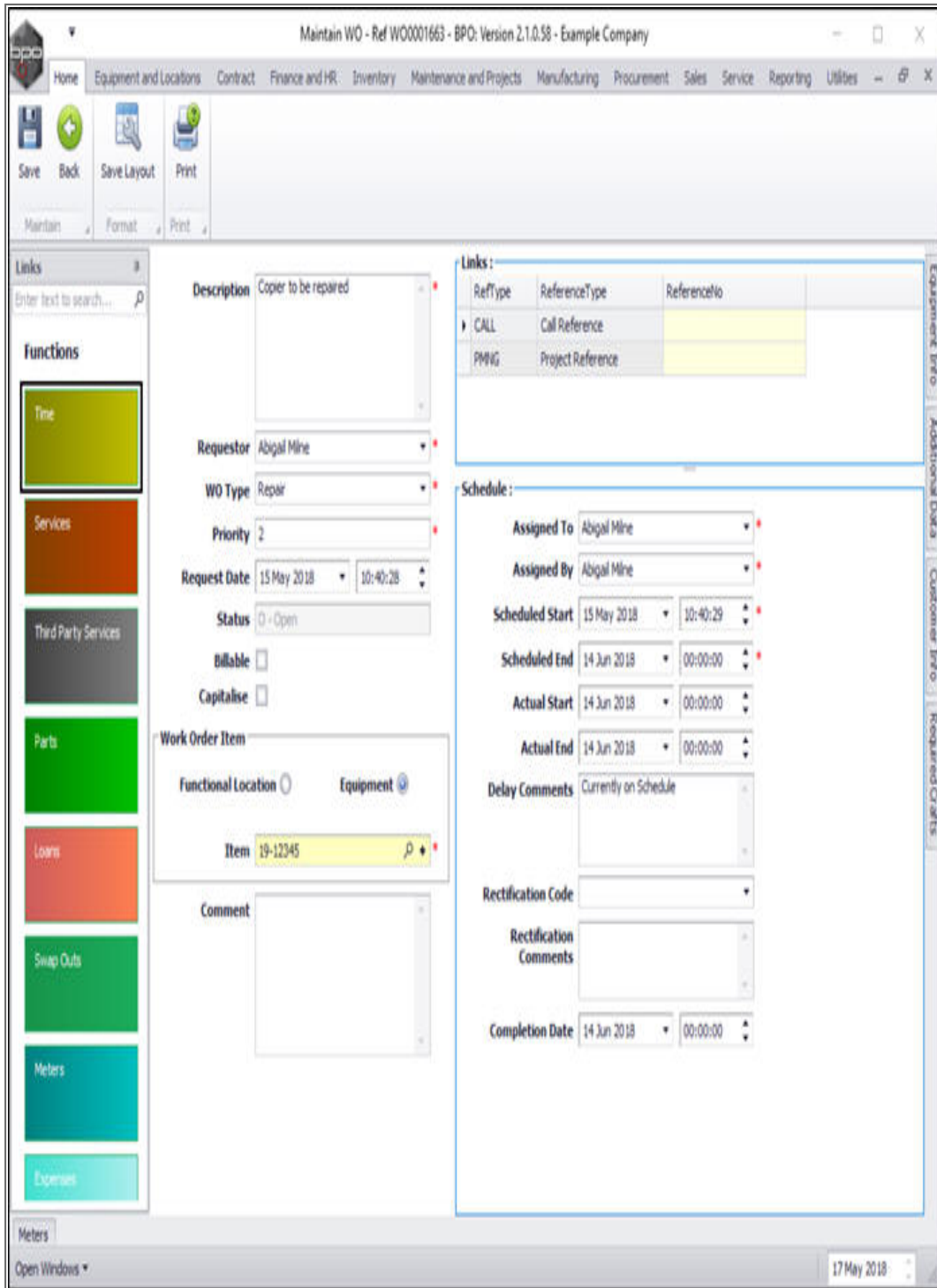
On the left side, there is a 'Functions' sidebar with buttons for 'Time', 'Services', 'Third Party Services', 'Parts', 'Loans', 'Swap Outs', 'Meters', and 'Expenses'. At the bottom left, there is a 'Meters' button and an 'Open Windows' dropdown. At the bottom right, a date indicator shows '17 May 2018'. On the far right edge, there are vertical tabs for 'Equipment Info', 'Customer Info', and 'Required Crafts'.

THE FUNCTIONS TILES

On the left side of this **Maintain WO** screen is the **Links** docking panel. This panel contains tiles that direct you to more information linked to the selected work order.

Time

- In the **Maintain WO - Ref []** screen, click on the **Time** tile.



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

- Here you can **Add**, **Edit**, **Delete** and **View** a list of labour time bookings linked to this work order.

Time bookings for WO Code W00001663 - BPO: Version 2.1.0.58 - 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 | Cur...

Drag a column header here to group by that column

| EmployeeNumber | FirstName | LastName | CraftName | ScheduledStartDate | StartDate | StartTime | ArrivalTime | EstLabourHours | RegularHours | OvertimeHours | OvertimeFactor | Comments | Billable |
|----------------|-----------|----------|-----------|--------------------|-------------|-----------|-------------|----------------|--------------|---------------|----------------|-------------|----------|
| MIL001 | Abigail | Mine | ACMN | 15 May 2018 | 15 May 2018 | 10:41:58 | 10:41:58 | 0.00 | 0.25 | 0.00 | 1.00 | Time Labour | No |
| JOE001 | Joel | James | TECH | 15 May 2018 | 15 May 2018 | 12:00:00 | 12:00:00 | 0.00 | 2.00 | 0.00 | 1.00 | Repair | No |

Open Windows | 17 May 2018

Services

- In the **Maintain WO - Ref []** screen, click on the **Services** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' interface. The left-hand navigation pane shows several functional tiles, with the 'Services' tile highlighted in orange. The main content area is divided into several sections:

- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:**
 - Functional Location: Equipment:
 - Item: 19-12345
 - Comment: [Empty text area]
- Links:**

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMNG | Project Reference | |
- Schedule:**
 - Assigned To: Abigail Mine
 - Assigned By: Abigail Mine
 - Scheduled Start: 15 May 2018 10:40:29
 - Scheduled End: 14 Jun 2018 00:00:00
 - Actual Start: 14 Jun 2018 00:00:00
 - Actual End: 14 Jun 2018 00:00:00
 - Delay Comments: Currently on Schedule
 - Rectification Code: [Empty dropdown]
 - Rectification Comments: [Empty text area]
 - Completion Date: 14 Jun 2018 00:00:00

The bottom right corner of the window shows the date '17 May 2018'.

The **Internal Services for WO Code []** screen will be displayed.

- Here you can **Add** to, **Edit**, **Delete** and **View** a list of requests for in-house service (non-stock) work linked to this work order.

Internal services for WO Code WO0001663 - BPO: Version 2.1.0.58 - 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 Cur...

Drag a column header here to group by that column

| ServiceCode | ServiceDescription | Quantity | Price | Billable | Status |
|-------------|--------------------|----------|--------|----------|--------|
| CALL | Call Out Fee | 1 | 100.00 | No | A |

Open Windows 17 May 2018

THIRD PARTY SERVICES

- In the **Maintain WO - Ref []** screen, click on the **Third Party Services** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' window. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Save, Back, Save Layout, and Print. A left sidebar contains 'Links' and 'Functions' sections with buttons for Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The main area is divided into several sections:

- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** 0 - Open
- Billable:**
- Capitalise:**
- Work Order Item:** Functional Location (radio button), Equipment (radio button), Item: 19-12345
- Comment:** (Empty text area)
- Links:** A table with columns RefType, ReferenceType, and ReferenceNo.

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMNG | Project Reference | |
- Schedule:**
 - Assigned To: Abigail Mine
 - Assigned By: Abigail Mine
 - Scheduled Start: 15 May 2018 10:40:29
 - Scheduled End: 14 Jun 2018 00:00:00
 - Actual Start: 14 Jun 2018 00:00:00
 - Actual End: 14 Jun 2018 00:00:00
 - Delay Comments: Currently on Schedule
 - Rectification Code: (Empty dropdown)
 - Rectification Comments: (Empty text area)
 - Completion Date: 14 Jun 2018 00:00:00

At the bottom, there is a 'Meters' section and an 'Open Windows' dropdown. The system date is shown as 17 May 2018.

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

- Here you can **Add**, **Edit**, **Delete** and **View** a list of requests for third party contract work linked to this work order.

Service Requests for WO Code W00001663 - BPO: Version 2.1.0.58 - 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 | Bilibie | Durban | Refresh | Export

Maintenance | Format | Process | Current | Print

Drag a column header here to group by that column

| WCode | WDescription | WorkCode | WorkDescription | RequestorName | RequiredDate | Comments | Quantity | ProcessStatus | EstimatedPrice | TotalCo |
|-----------|-----------------------|----------|-----------------|---------------|--------------|--|----------|----------------------|----------------|---------|
| W00001663 | Copier to be repaired | DEL | Delivery Fee | Abigal Mine | 17 May 2018 | Parts to be delivered by external delivery company | 1 | Requisition Required | 150.00 | 150.00 |

Open Windows | 17 May 2018

Parts

- In the **Maintain WO - Ref []** screen, click on the **Parts** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' interface. The 'Parts' tile in the left-hand 'Functions' menu is highlighted with a red box. The main area shows details for a work order item, including description, requestor, type, priority, date, status, and a table of links.

Work Order Item Details:

- Description: Copier to be repaired
- Requestor: Abigail Mine
- WO Type: Repair
- Priority: 2
- Request Date: 15 May 2018 10:40:28
- Status: Open
- Billable:
- Capitalise:
- Functional Location: Functional Location Equipment
- Item: 19-12345
- Comment: [Empty text area]

Links Table:

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMNG | Project Reference | |

Schedule:

- Assigned To: Abigail Mine
- Assigned By: Abigail Mine
- Scheduled Start: 15 May 2018 10:40:29
- Scheduled End: 14 Jun 2018 00:00:00
- Actual Start: 14 Jun 2018 00:00:00
- Actual End: 14 Jun 2018 00:00:00
- Delay Comments: Currently on Schedule
- Rectification Code: [Empty dropdown]
- Rectification Comments: [Empty text area]
- Completion Date: 14 Jun 2018 00:00:00

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

- Here you can **Add** to, **Edit**, **Delete** and **View** a list of requests for parts from store linked to this work order

Part Requests for WO Code W00001663 - BPO: Version 2.1.0.58 - 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 | Save Filter | Requisition | Issue | Transfer | Note | Change Whse | Remap Part | Create Part

Durban | All States | Refresh | Print | Export

Maintenance | Format | Process | Current | Print

Drag a column header here to group by that column

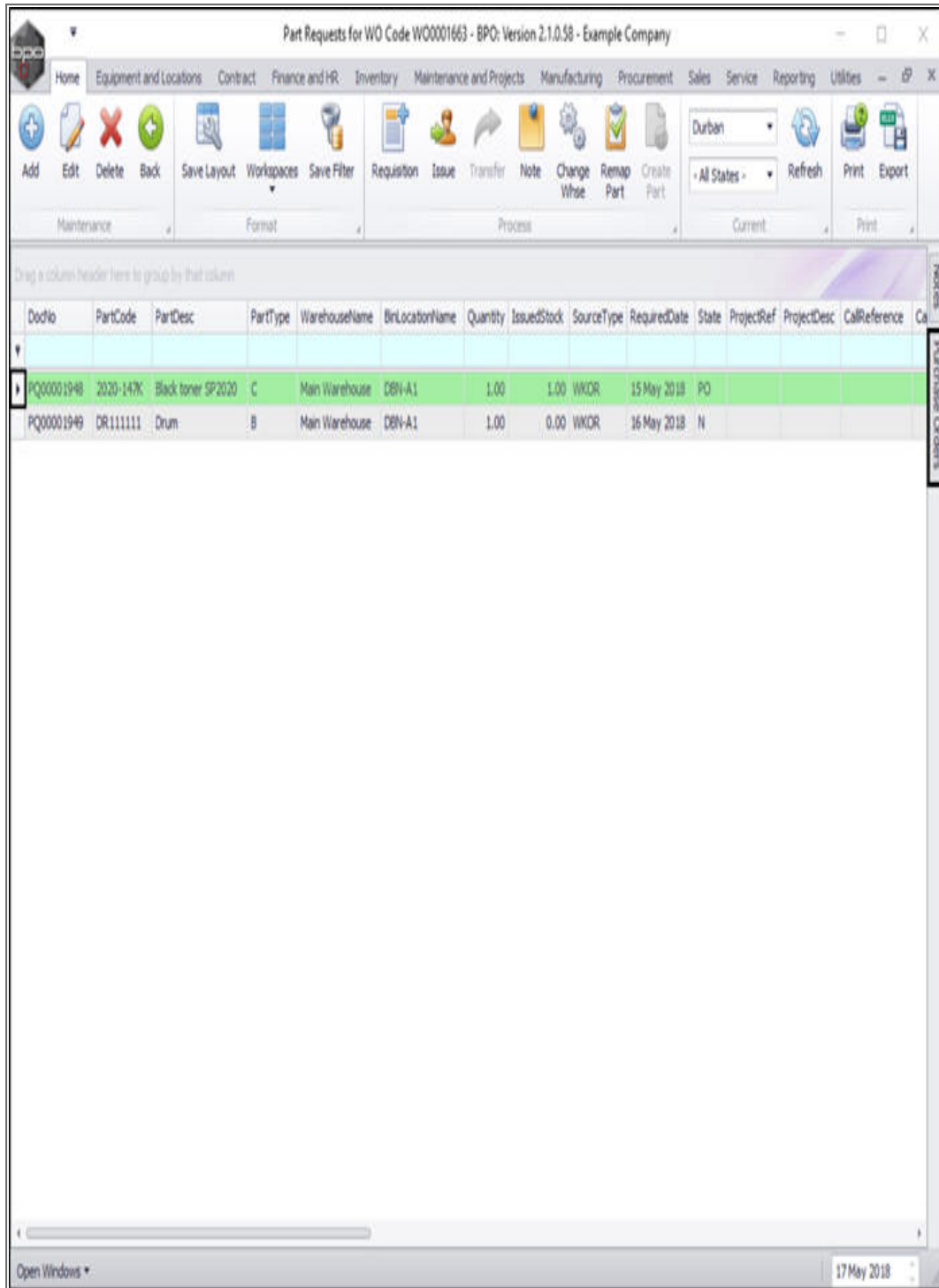
| DodId | PartCode | PartDesc | PartType | WarehouseName | BinLocationName | Quantity | IssuedStock | SourceType | RequiredDate | State | ProjectRef | ProjectDesc | CallReference |
|------------|-----------|--------------------|----------|----------------|-----------------|----------|-------------|------------|--------------|-------|------------|-------------|---------------|
| PQ00001948 | 2020-147K | Black toner SP2020 | C | Main Warehouse | DBN-A1 | 1.00 | 1.00 | WKOR | 15 May 2018 | PO | | | |
| PQ00001949 | DR1111111 | Drum | B | Main Warehouse | DBN-A1 | 1.00 | 0.00 | WKOR | 16 May 2018 | N | | | |

Open Windows | 17 May 2018

Purchase Orders

In this screen you can also view the **Purchase Orders** linked to each part request.

- Click on the **row selector** in front of any **part request**.
- Click on the **Purchase Orders** tab on the right side of the screen.



- The docking panel will be expanded to display all the **purchase orders** linked to the selected **part**.

Part Requests for WO Code W00001663 - BPO: Version 2.1.0.58 - 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 | Save Filter | Requisition | Issue | Transfer | Note | Change Whtse | Remap Part | Create Part

Durban | - All States - | Refresh | Print | Export

| DocNo | PartCode | PartDesc | PartType | WarehouseName |
|------------|-----------|--------------------|----------|----------------|
| PQ00001948 | 2020-147K | Black toner SP2020 | C | Main Warehouse |
| PQ00001949 | DR1111111 | Drum | B | Main Warehouse |

| POCode | PartType | PartCode | PartDesc | SupplierCode | SupplierName | UnitCost | Quantity |
|-----------|----------|-----------|--------------------|--------------|---------------------------|----------|----------|
| PO0000244 | C | 2020-147K | Black toner SP2020 | SPR001 | Sprint Distributors Local | 450.00 | 2 |
| PO0000244 | C | 2020-147K | Black toner SP2020 | SPR001 | Sprint Distributors Local | 450.00 | 2 |
| PO0000332 | C | 2020-147K | Black toner SP2020 | SPR001 | Sprint Distributors Local | 459.26 | 361 |
| PO0000340 | C | 2020-147K | Black toner SP2020 | SPR001 | Sprint Distributors Local | 459.26 | 0 |
| PO0000430 | C | 2020-147K | Black toner SP2020 | YES001 | Young Electric | 500.00 | 6 |
| PO0000431 | C | 2020-147K | Black toner SP2020 | YES001 | Young Electric | 500.00 | 5 |
| PO0000446 | C | 2020-147K | Black toner SP2020 | SPR002 | Sprint International | 483.63 | 1 |

Open Windows | 17 May 2018

Loans

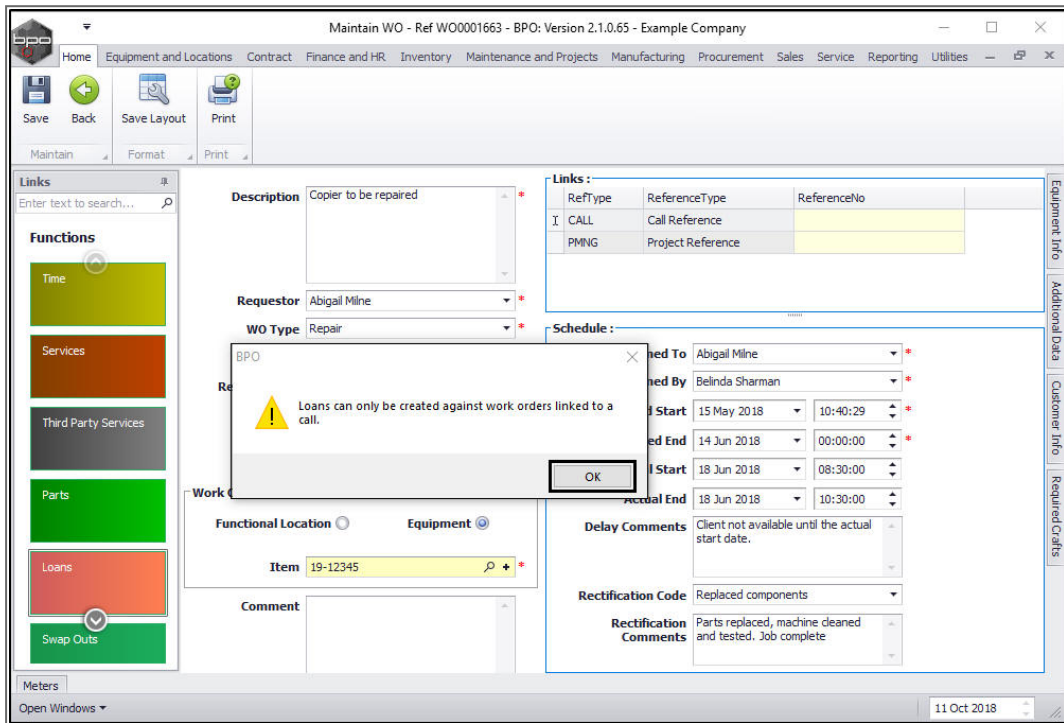
- In the **Maintain WO - Ref []** screen, click on the **Loans** tile.

The screenshot shows the 'Maintain WO - Ref WO0001663' interface. The 'Loans' tile is selected in the left-hand 'Functions' menu. The main window displays the following details:

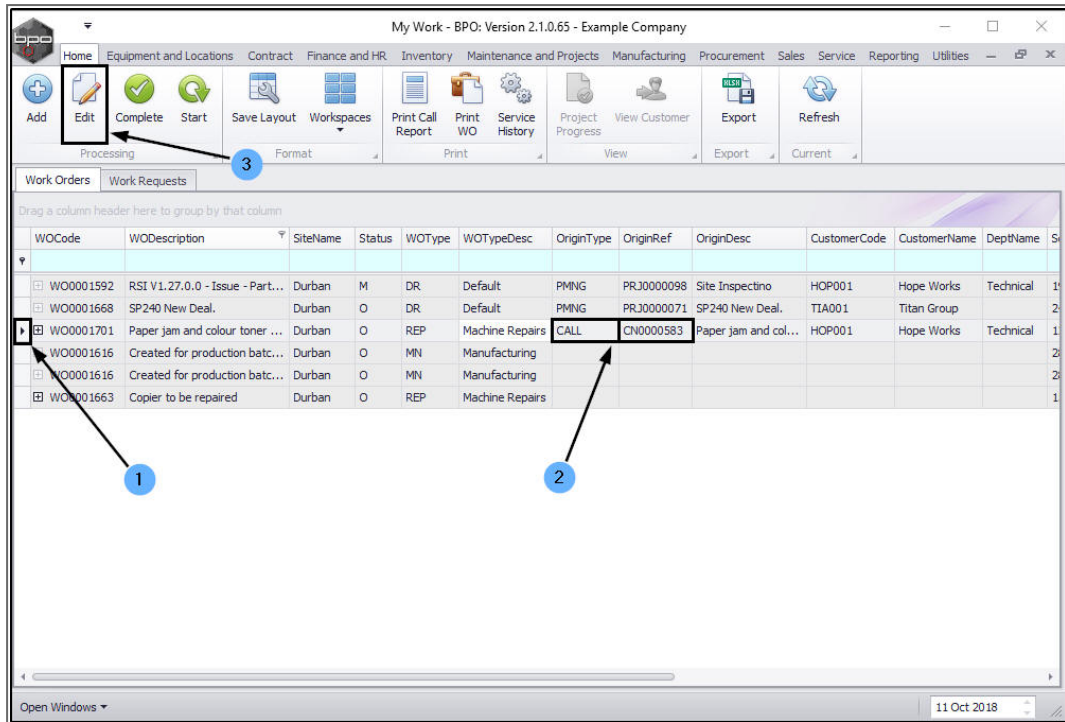
- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:**
 - Functional Location: Equipment:
 - Item: 19-12345
 - Comment: [Empty text area]
- Links Table:**

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMNG | Project Reference | |
- Schedule:**
 - Assigned To: Abigail Mine
 - Assigned By: Abigail Mine
 - Scheduled Start: 15 May 2018 10:40:29
 - Scheduled End: 14 Jun 2018 00:00:00
 - Actual Start: 14 Jun 2018 00:00:00
 - Actual End: 14 Jun 2018 00:00:00
 - Delay Comments: Currently on Schedule
 - Rectification Code: [Empty dropdown]
 - Rectification Comments: [Empty text area]
 - Completion Date: 14 Jun 2018 00:00:00

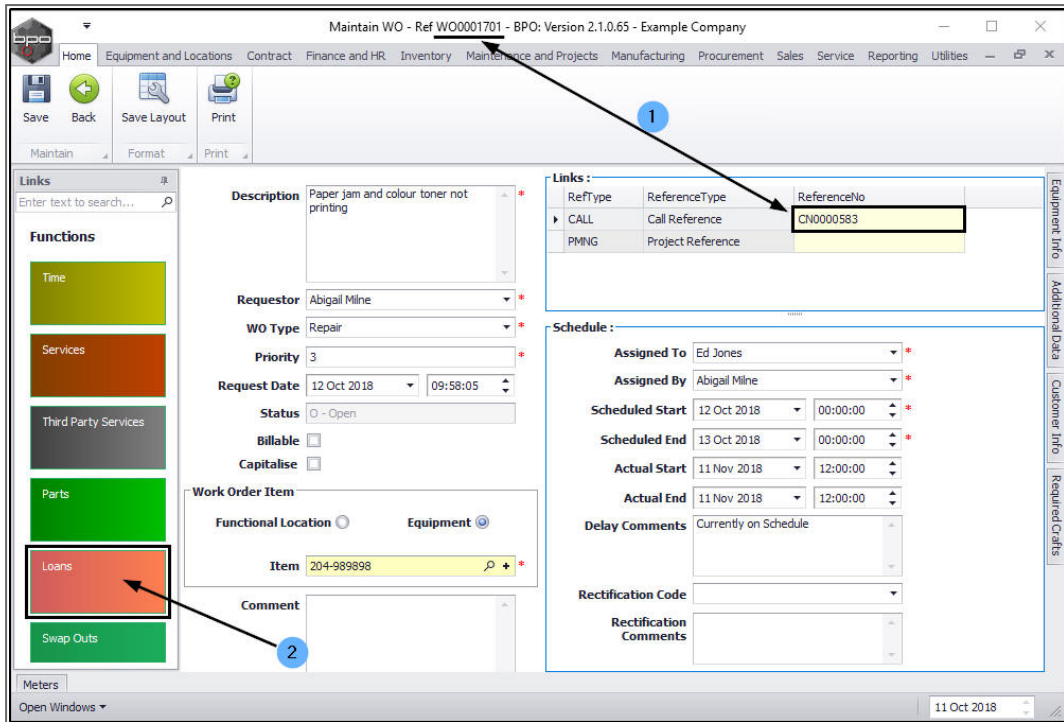
- If your initially selected work order is not linked to a **call** then the following BPO processing message will pop up;
 - **Loans can only be created against work orders linked to a call.**
- Click on **OK**.



1. Go back to the **My Work** listing screen and select a work order that is **linked to a call**.
2. Check the **Origin Type** and **Origin Reference** column to see whether the selected work order is linked to a **call**
3. Click on **Edit**.

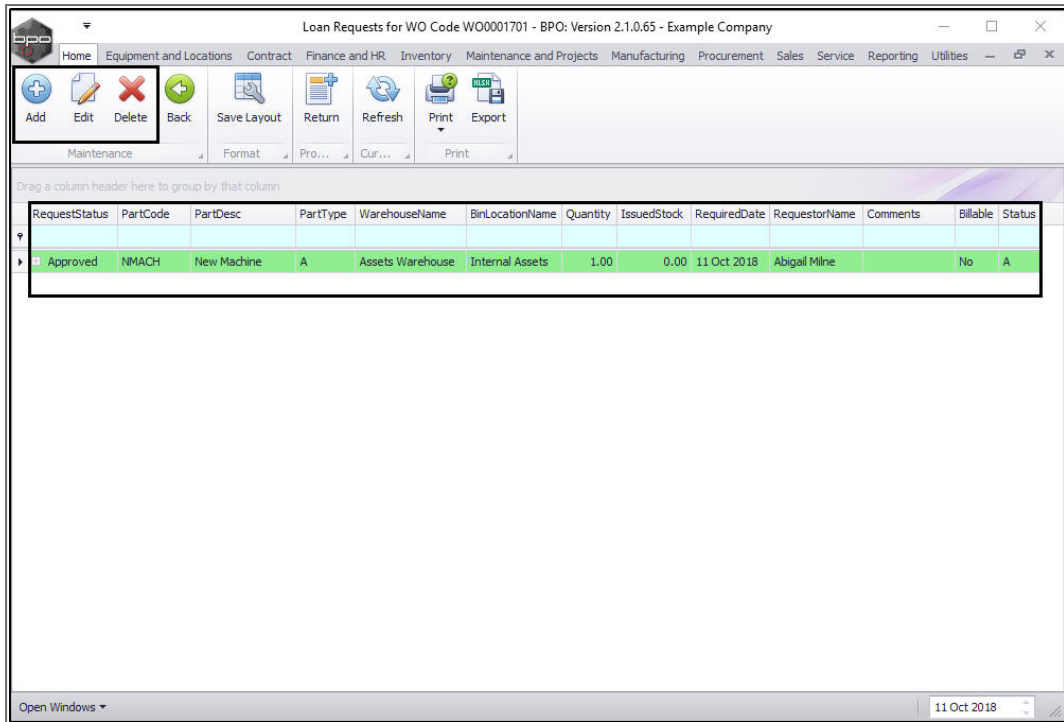


- The **Maintain WO - Ref []** screen will be displayed for the selected work order that is now linked to a **call**.
- Click on the **Loans** tile.



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

- Here you can **Add** to, **Edit**, **Delete** and **View** a list of loan requests from store linked to this work order.



Swap Outs

- In the **Maintain WO - Ref []** screen, click on the **Swap Outs** tile.

The screenshot displays the 'Maintain WO' interface for a work order with reference WO0001663. The main form contains the following details:

- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018, 10:40:28
- Status:** 0 - Open
- Billable:**
- Capitalise:**
- Work Order Item:**
 - Functional Location: Equipment
 - Item: 19-12345
 - Comment: (empty)

The **Schedule** section includes:

- Assigned To:** Abigail Mine
- Assigned By:** Abigail Mine
- Scheduled Start:** 15 May 2018, 10:40:29
- Scheduled End:** 14 Jun 2018, 00:00:00
- Actual Start:** 14 Jun 2018, 00:00:00
- Actual End:** 14 Jun 2018, 00:00:00
- Delay Comments:** Currently on Schedule
- Rectification Code:** (empty)
- Rectification Comments:** (empty)
- Completion Date:** 14 Jun 2018, 00:00:00

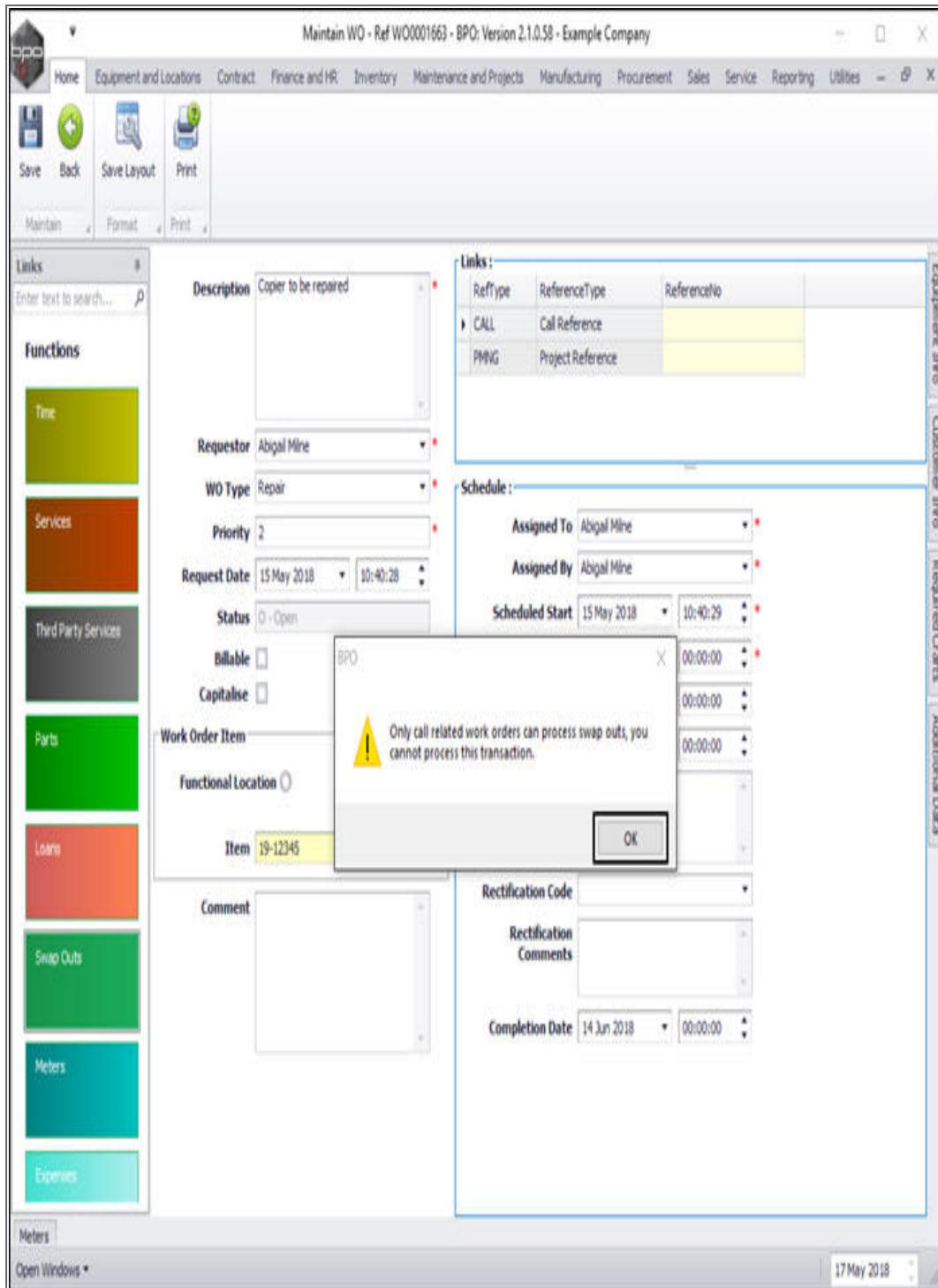
The **Links** table shows:

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMWG | Project Reference | |

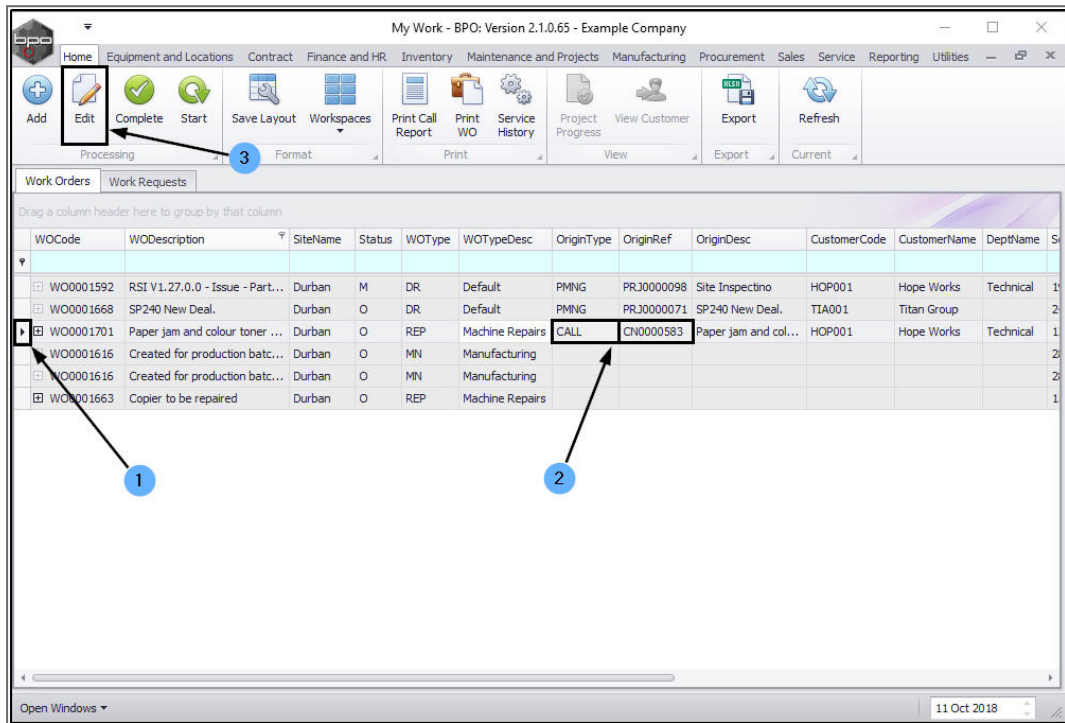
On the left, a 'Functions' sidebar lists options like Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The top navigation bar includes Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities.

- If your initially selected work order is not linked to a **call** then the following **BPO** processing message will pop up;

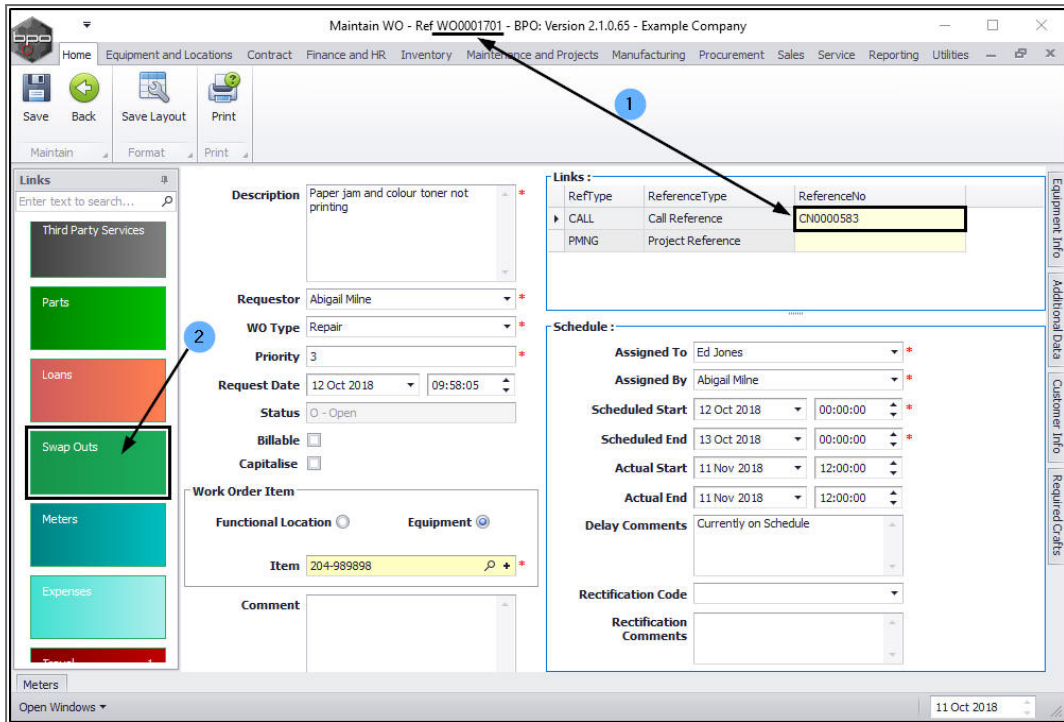
- Only call related work orders can process swap outs, you cannot process this transaction.
- Click on **OK**.



1. Go back to the **My Work** listing screen and select a work order that is linked to a **call**.
2. Check the **Origin Type** and **Origin Reference** column to see whether the selected work order is linked to a **call**
3. Click on **Edit**.

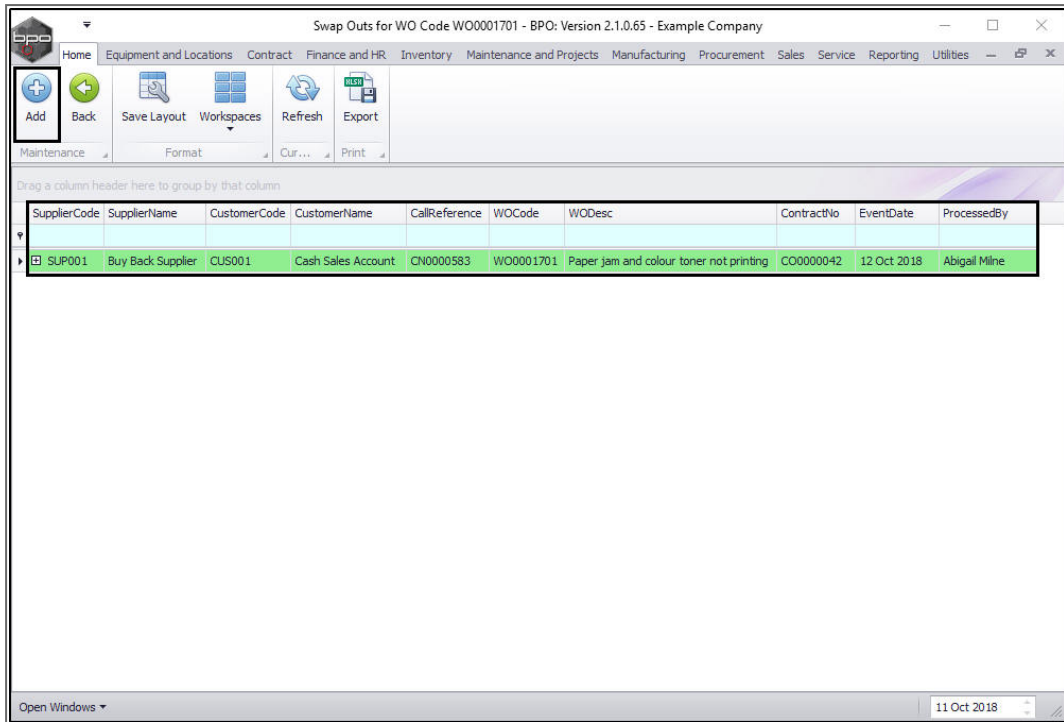


- The **Maintain WO - Ref []** screen will be displayed for the selected work order that is now linked to a **call**.
- Click on the **Swap Outs** tile.



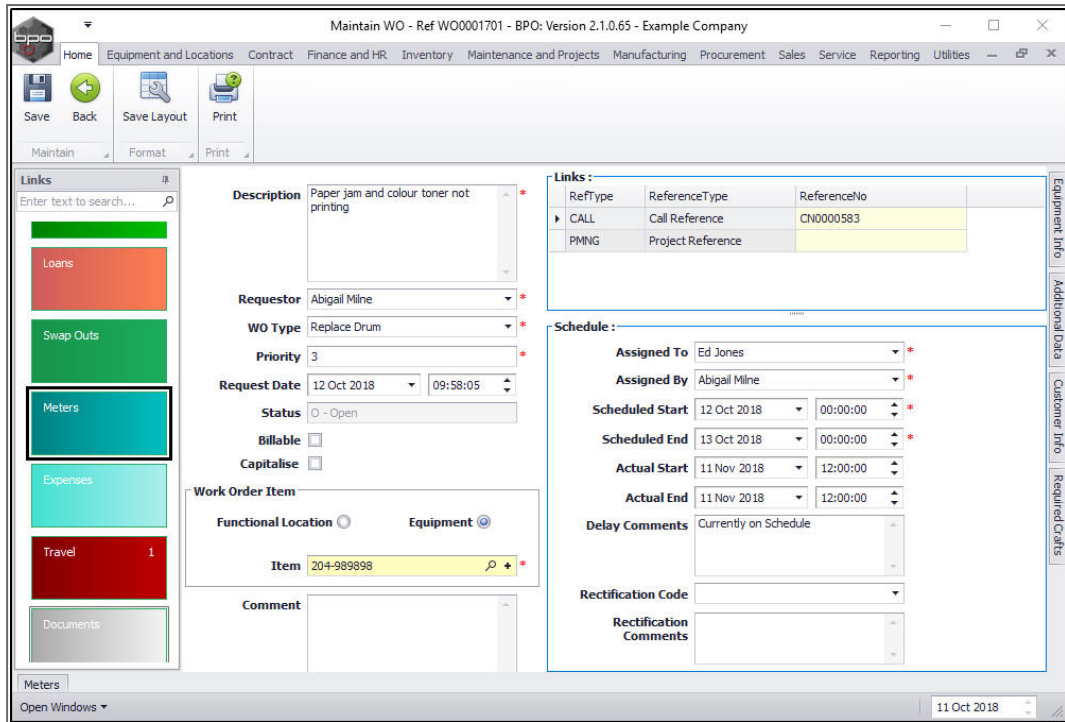
The **Swap Outs for WO Code []** screen will be displayed.

- Here you can **Add** to and **View** a list of swap outs from store linked to this work order.



Meters

- In the **Maintain WO - Ref []** screen, click on the **Meters** tile.



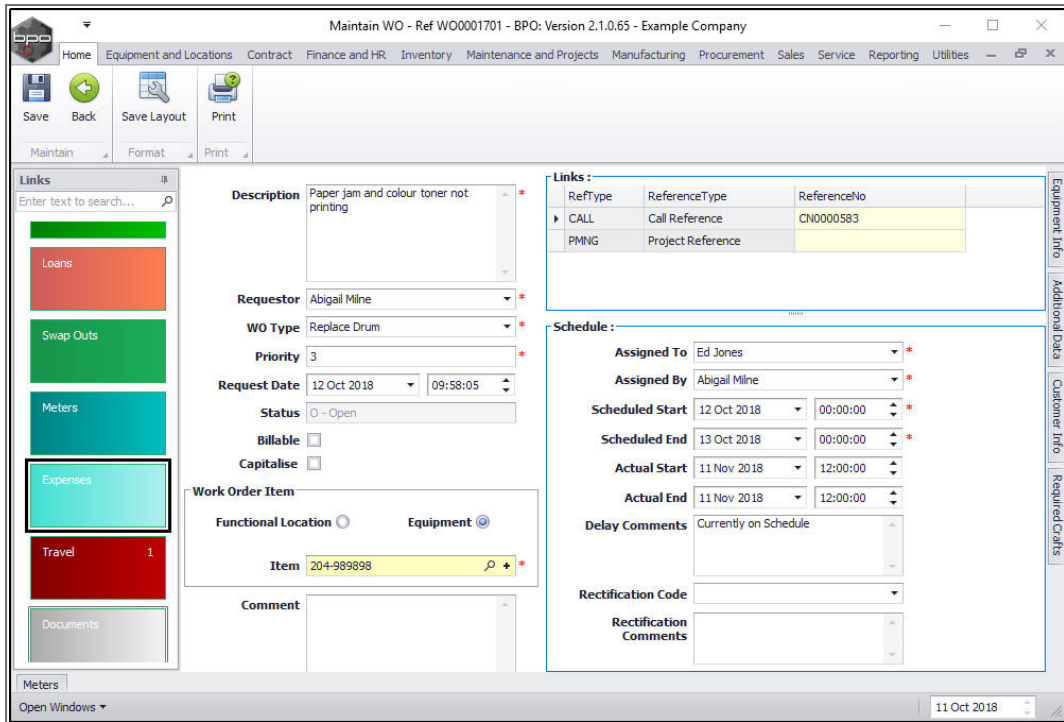
The **Meters for WO Code []** screen will be displayed.

- Here you can view a list of the **meter readings** for the items linked to the selected work order.
- In this screen you can edit/add to the **Reading Date, Reading Time, Meter Reading** and **Comments** columns as required.

| MeterCode | SourceType | ItemType | SignalTag | Unit | CodeDescription | ReadingDate | ReadingTime | RollCount | MeterReading | Comments |
|------------|------------|----------|-----------|--------|-----------------|-------------|-------------|-----------|--------------|----------|
| Mono_409 | CALL | ASMN | | Copies | Copies made | 12 Oct 2018 | 10:00:21 | 0 | 0.00 | |
| Colour_409 | CALL | ASMN | | Copies | Copies made | 12 Oct 2018 | 10:00:21 | 0 | 0.00 | |

Expenses

- In the **Maintain WO - Ref []** screen, click on the **Expenses** tile.



The **Expense Claims for WO Code []** screen will be displayed.

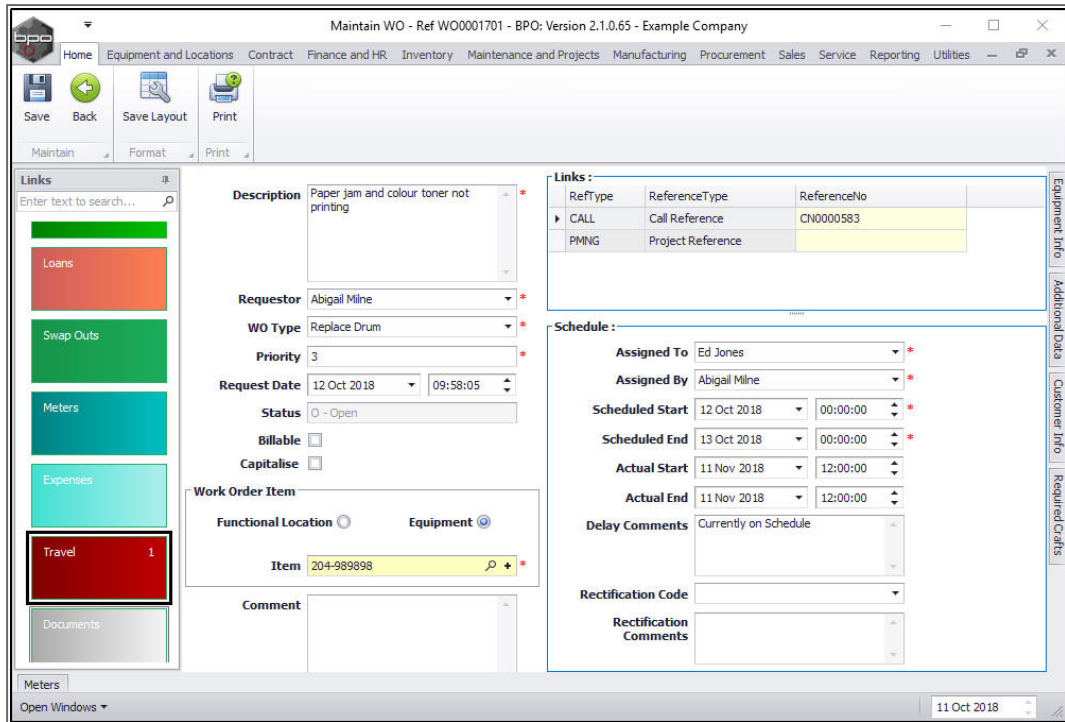
- Here you can view a list of the **expense claims** linked to the selected work order.
- In this screen you can **Add, Edit** or **Delete** expense claims as required.

The screenshot shows a software window titled "Expense Claims for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company". The interface includes a menu 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 menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Workspaces, Refresh, and Export. The main area contains a table with the following data:

| FullName | ExpenseDate | ExpenseType | ExpenseTypeDesc | Description | Amount | SourceDocRef | SourceDocAvailable | Billable | Status |
|---------------|-------------|-------------|-----------------|---|--------|--------------|--------------------|----------|--------|
| Abigail Milne | 12 Oct 2018 | TOLL | Toll | Richmond Toll - N3 - to and from client premises. | 130.00 | Receipt | Yes | Yes | A |

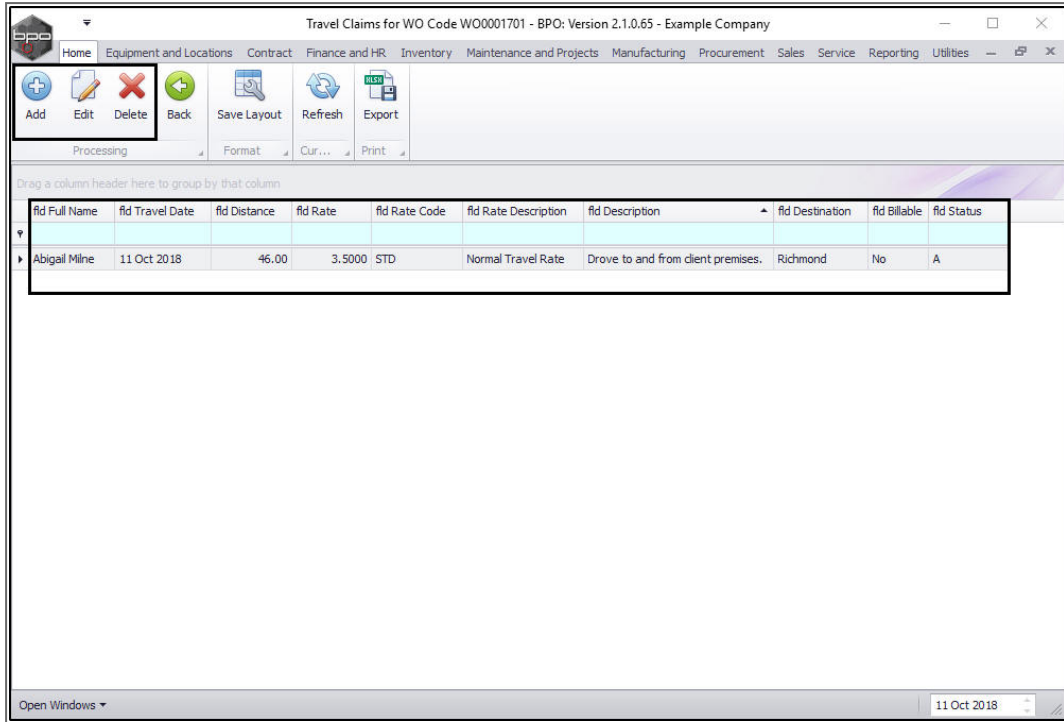
Travel

- In the **Maintain WO - Ref []** screen, click on the **Travel** tile.



The **Travel Claims for WO Code []** screen will be displayed.

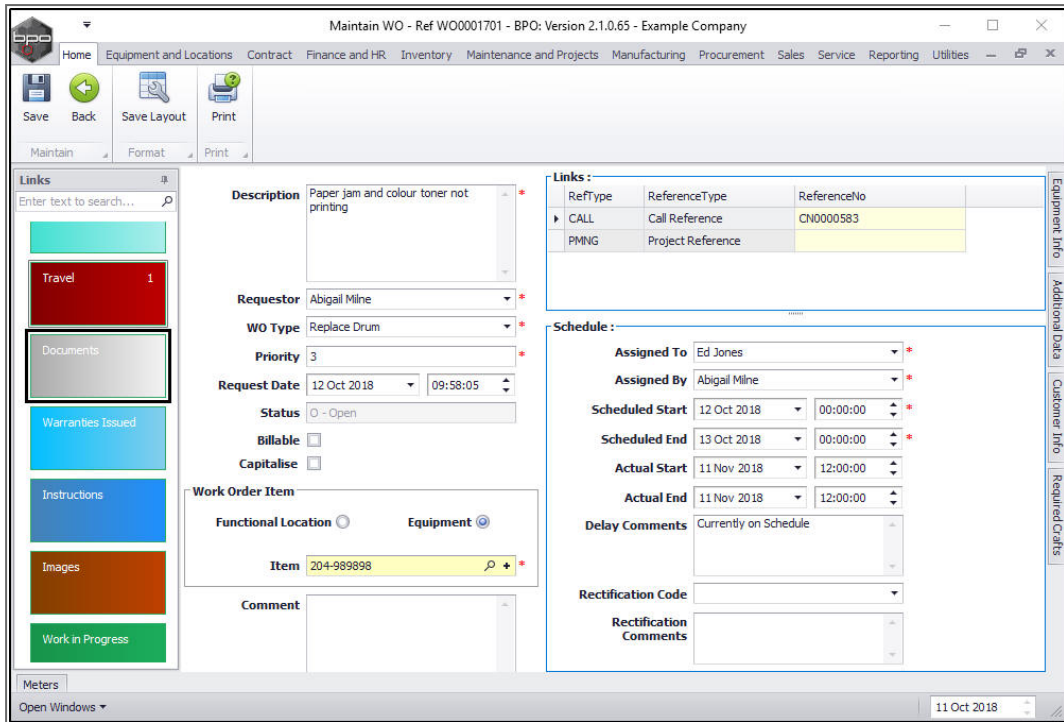
- Here you can view a list of the **travel claims** linked to the selected work order.
- In this screen you can **Add, Edit** or **Delete** travel claims as required.



| fId Full Name | fId Travel Date | fId Distance | fId Rate | fId Rate Code | fId Rate Description | fId Description | fId Destination | fId Billable | fId Status |
|---------------|-----------------|--------------|----------|---------------|----------------------|------------------------------------|-----------------|--------------|------------|
| Abigail Milne | 11 Oct 2018 | 46.00 | 3.5000 | STD | Normal Travel Rate | Drove to and from client premises. | Richmond | No | A |

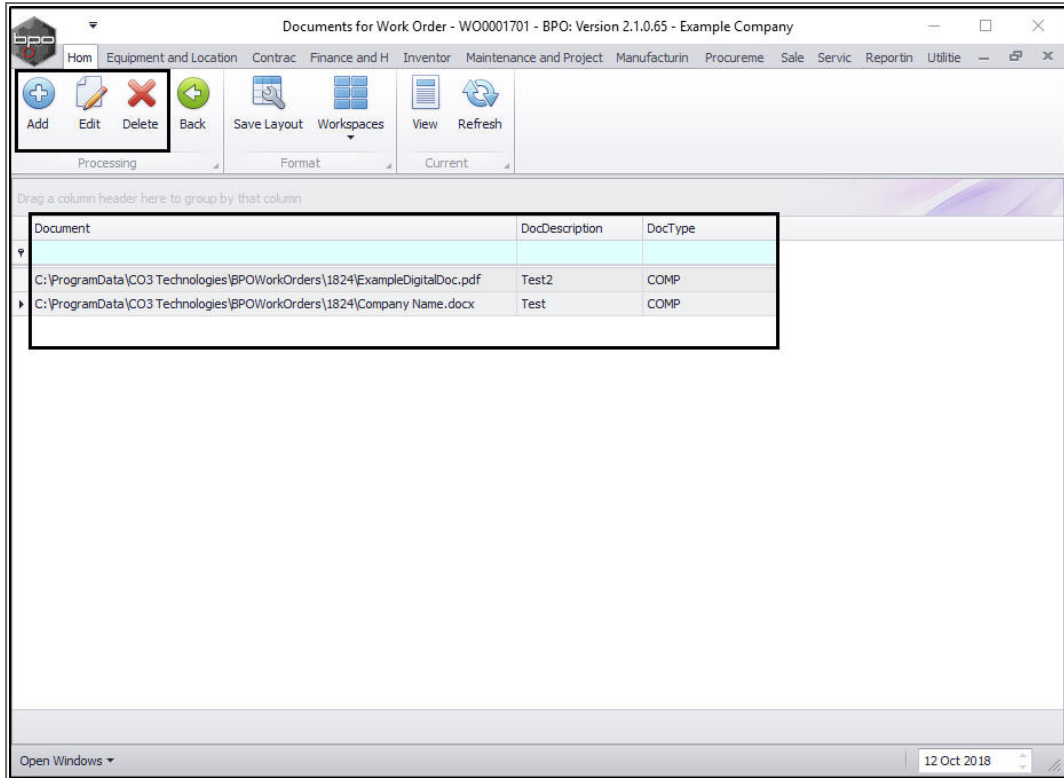
Documents

- In the **Maintain WO - Ref []** screen, click on the **Documents** tile.



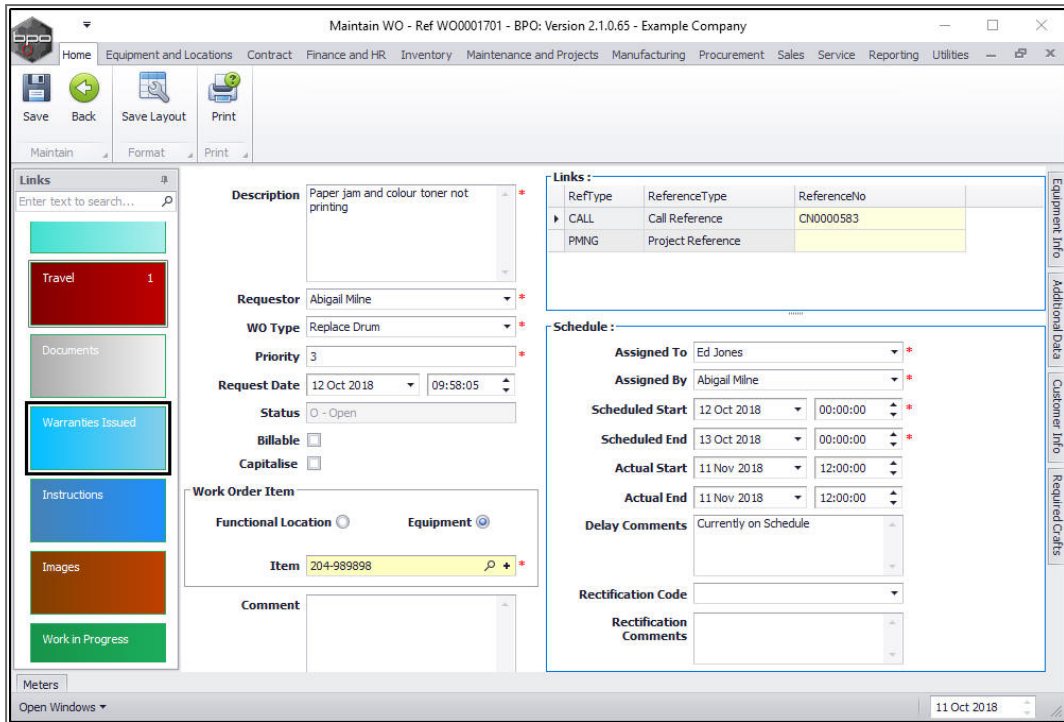
The **Documents for WO Code []** screen will be displayed.

- Here you can view a list of the **digital documents** linked to the selected work order.
- In this screen you can **view, Add, Edit** or **Delete** digital documents as required.



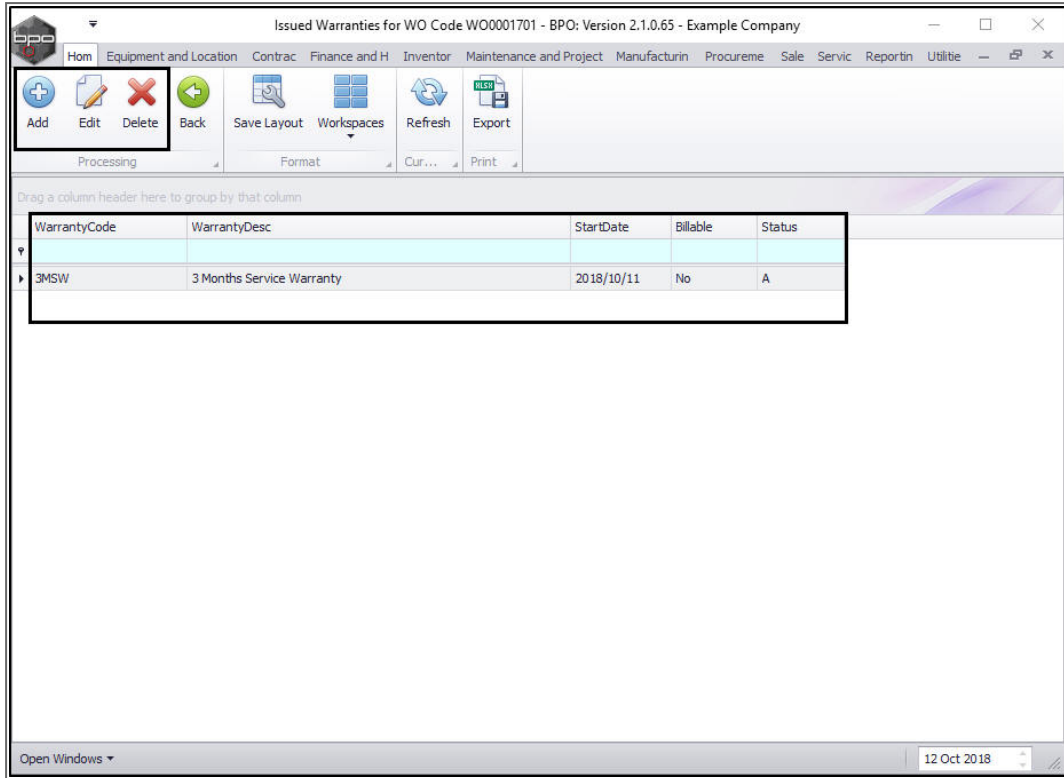
Warranties Issued

- In the **Maintain WO - Ref []** screen, click on the **Warranties Issued** tile.



The **Issued Warranties for WO Code []** screen will be displayed.

- Here you can view a list of the **issued warranties** linked to the selected work order.
- In this screen you can **Add, Edit** or **Delete** warranties as required.



Issued Warranties for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Location Contract Finance and H Inventor Maintenance and Project Manufacturin Procureme Sale Servic Reportin Utilitie

Add Edit Delete Back Save Layout Workspaces Refresh Export

Processing Format Cur... Print

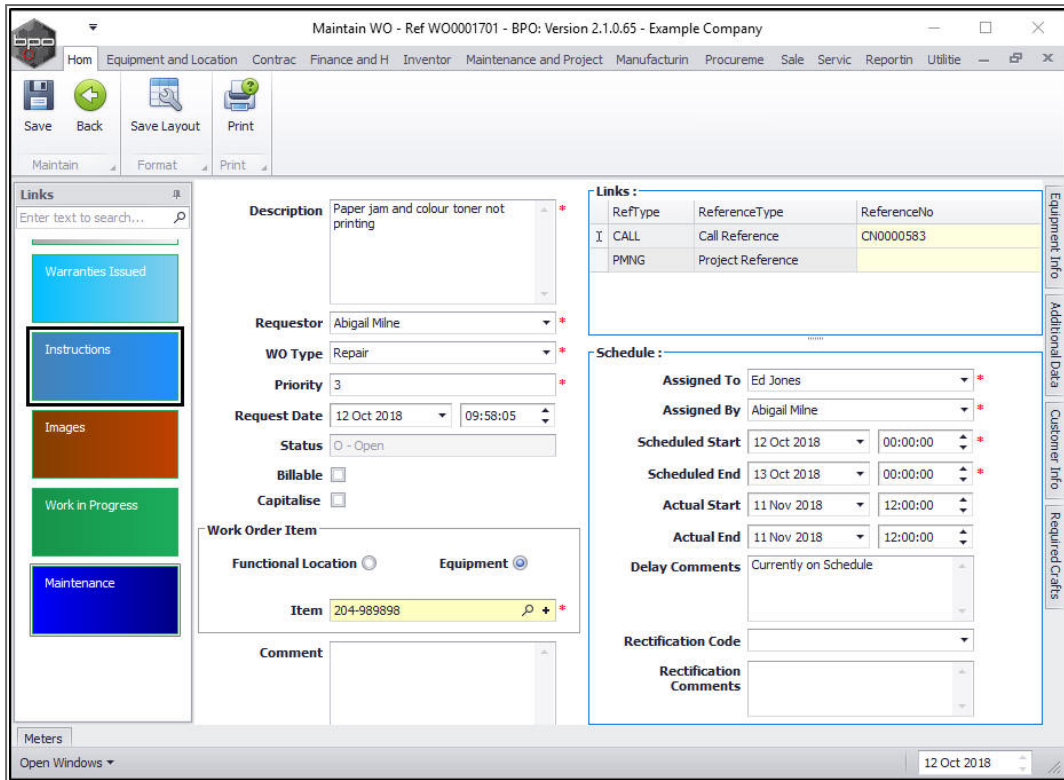
Drag a column header here to group by that column

| WarrantyCode | WarrantyDesc | StartDate | Billable | Status |
|--------------|---------------------------|------------|----------|--------|
| 3MSW | 3 Months Service Warranty | 2018/10/11 | No | A |

Open Windows 12 Oct 2018

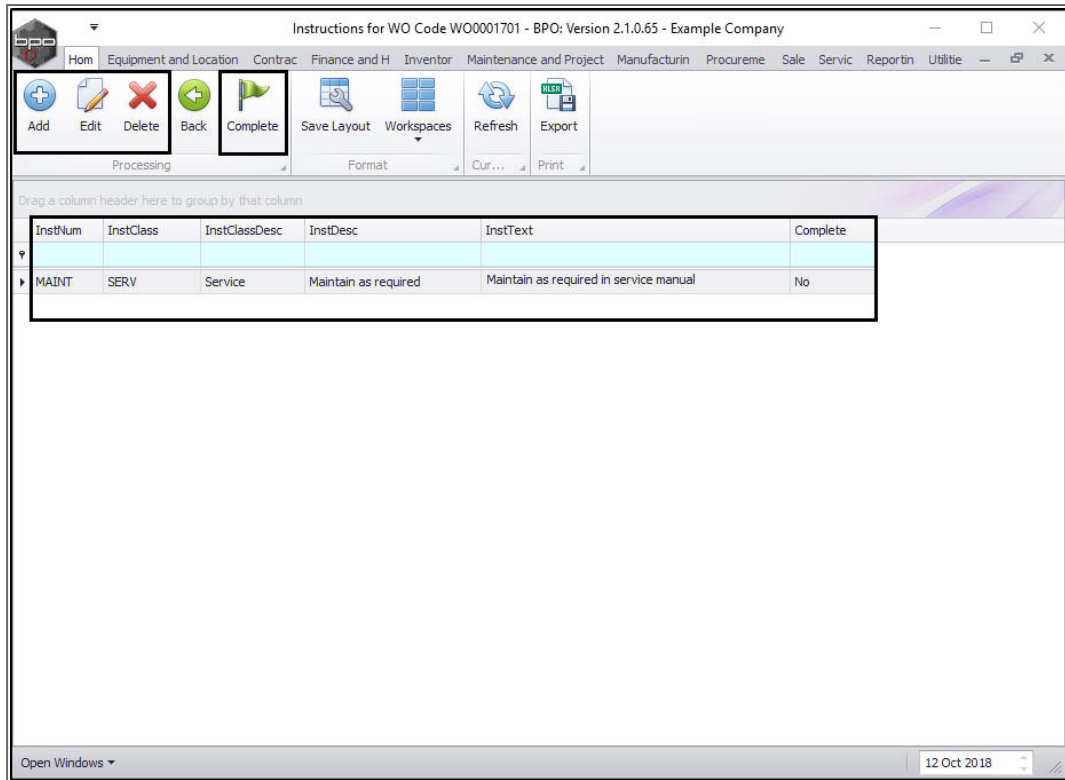
Instructions

- In the **Maintain WO - Ref []** screen, click on the **Instructions** tile.



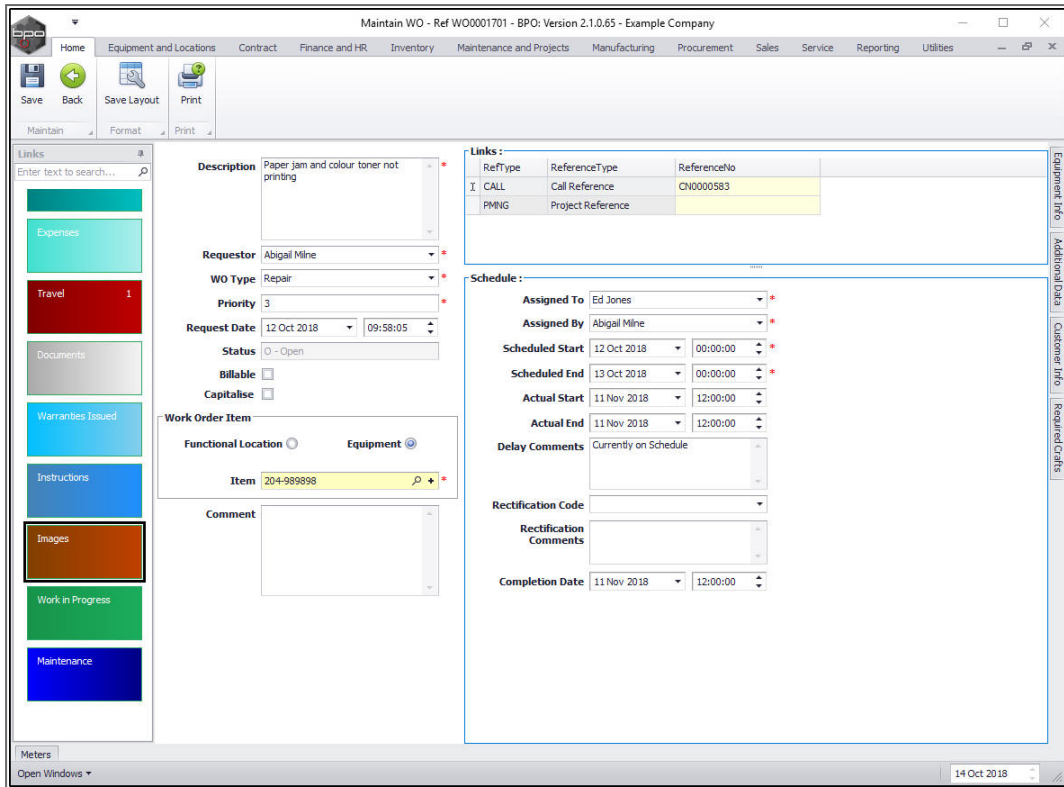
The **Instructions for WO Code []** screen will be displayed.

- Here you can view a list of the **instructions** linked to the selected work order.
- In this screen you can **Add, Edit, Delete** or **Complete** instructions as required.



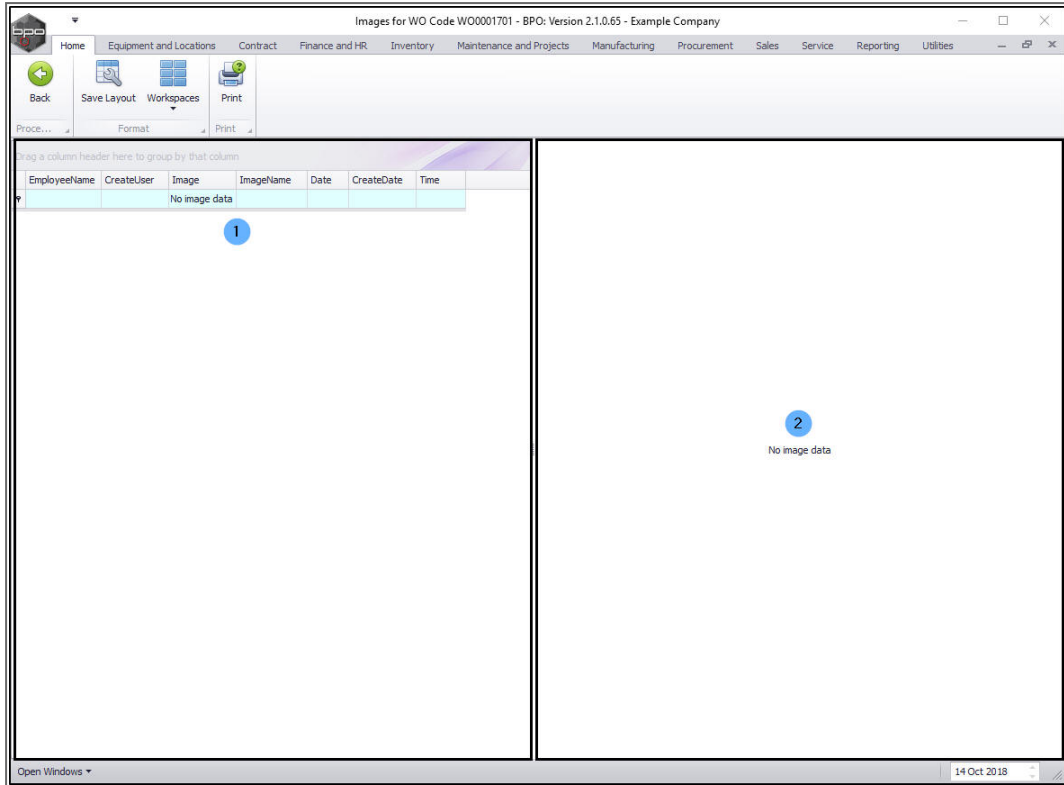
Images

- In the **Maintain WO - Ref []** screen, click on the **Images** tile.



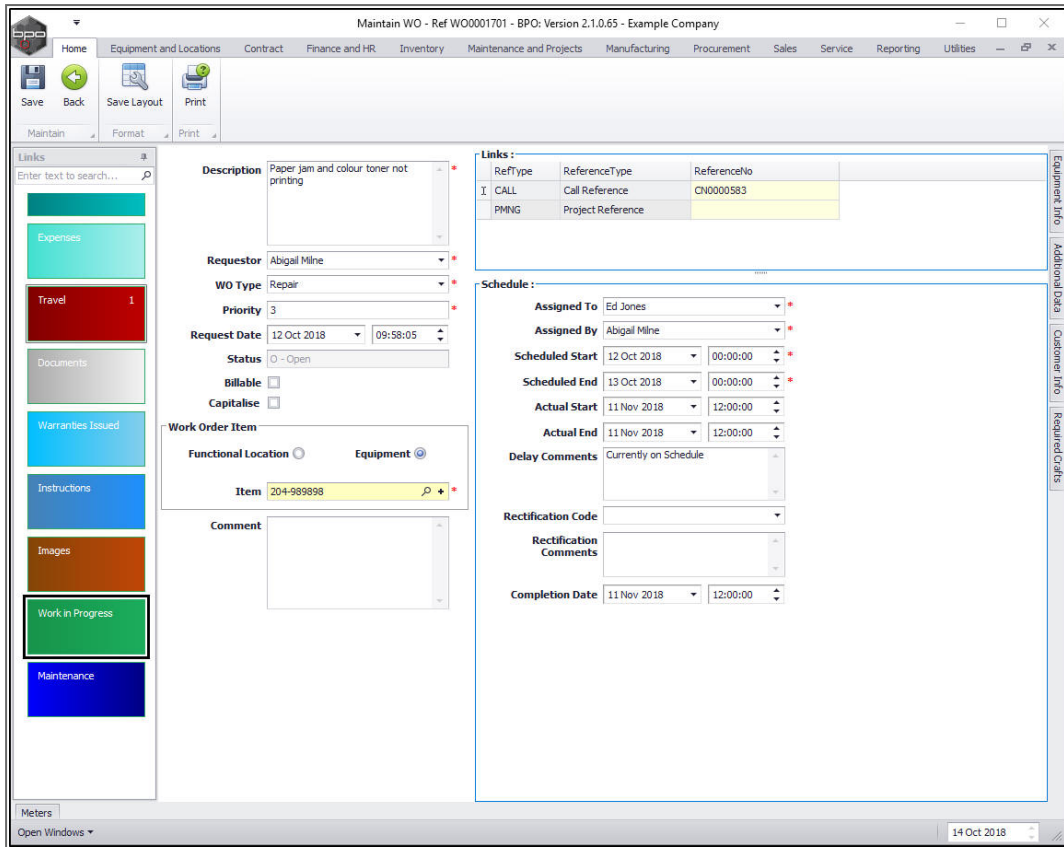
The **Images for WO Code []** screen will be displayed.

1. The left side of the screen will list the **employee name** and details of the **image name, date, create date** and **time**. Click on the row selector in front of the image name that you wish to view.
2. On the right side of the screen, is where you can view the **image**, when you have selected the row on the left.



Work in Progress

- In the **Maintain WO - Ref []** screen, click on the **Work in Progress** tile.



The **Work in Progress for WO Code []** screen will be displayed.

1. Here you can view a list of all the **work in progress** for the selected work order.
2. In this screen you can **Return** the item linked to the WO, **Invoice the WO, Invoice the Call or Project** (depending on whether the work order is linked to a call or project).

Work in Progress for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company

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

Return Invoice WO Invoice Call Back Save Layout Workspaces Refresh Export

Processing Format Cur... Print

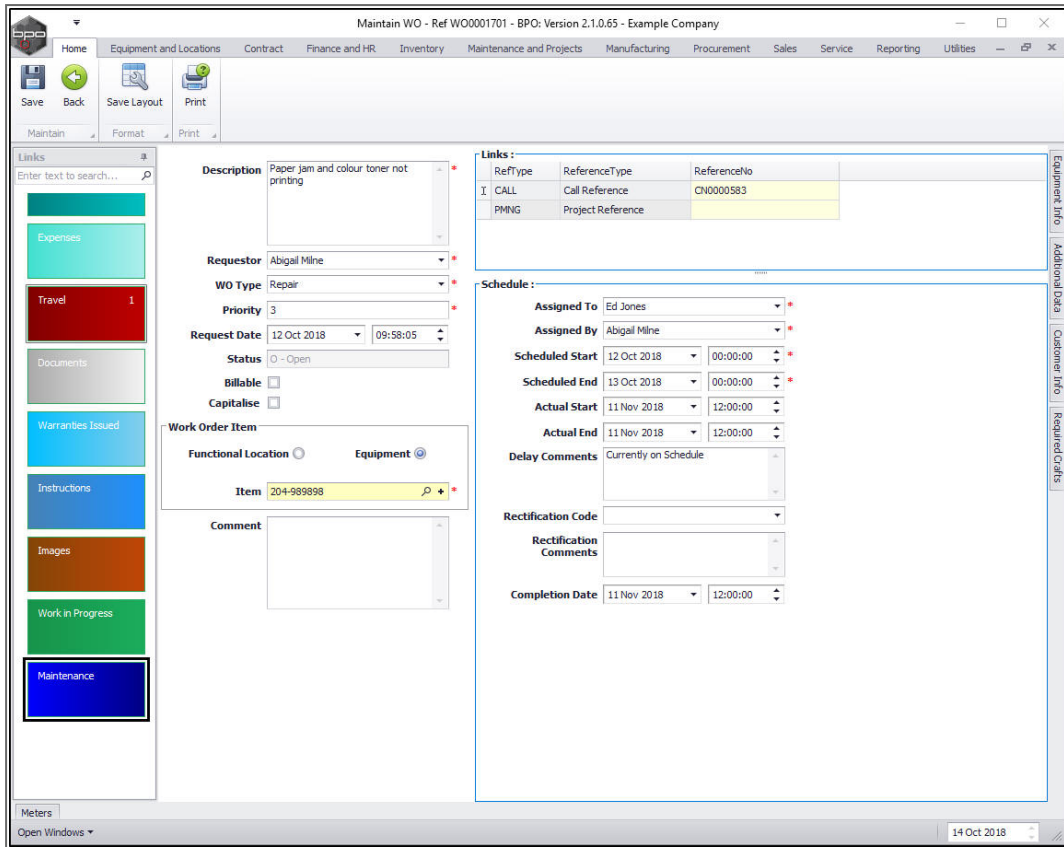
Drag a column header here to group by that column

| DocNo | EventDate | SourceType | ItemType | ItemCode | ItemDesc | BatchNo | Quantity | UnitCost | Billable | WOCode | WODesc | CustomerCode | CustomerName |
|------------|------------|------------|----------|----------|---------------|-----------|----------|----------|----------|-----------|---|--------------|--------------|
| SI00000786 | 2018/10/12 | INVI | INVN | SP1818 | Sprint copier | 1818-8594 | 1.00 | 5 000.00 | No | WO0001701 | Paper jam and colour toner not printing | HOP001 | Hope Works |

Open Windows | 14 Oct 2018

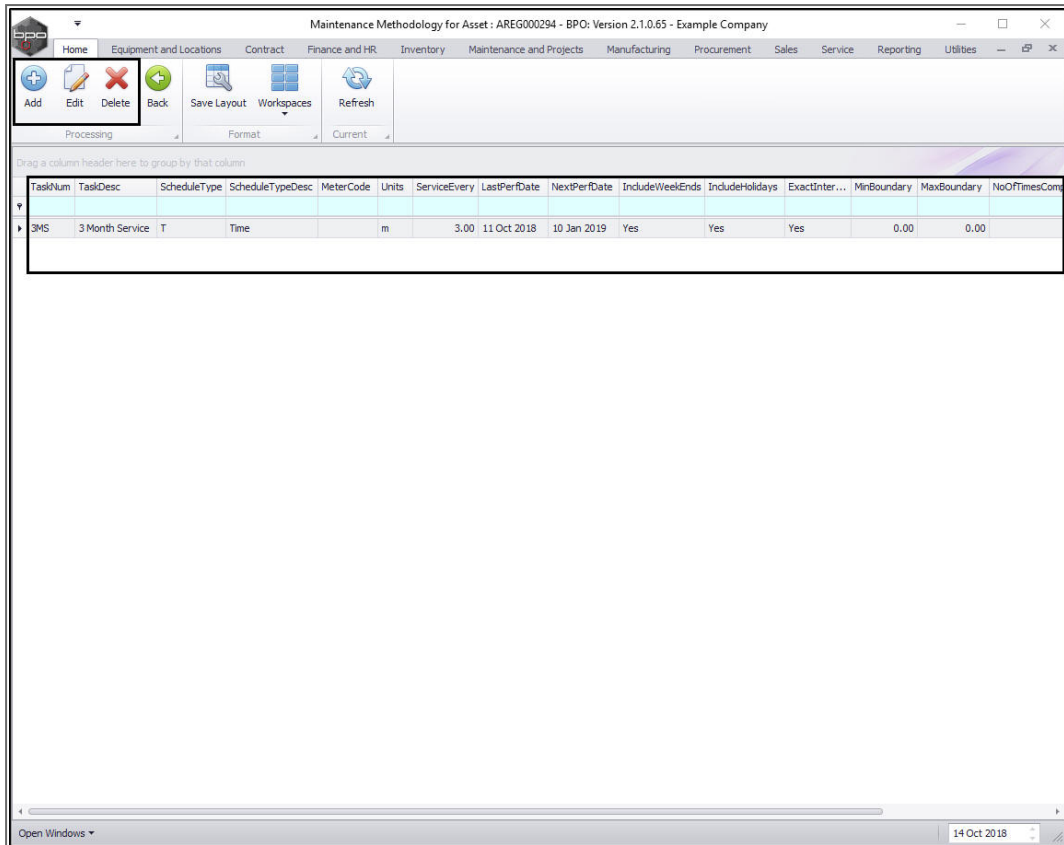
Maintenance

- In the **Maintain WO - Ref []** screen, click on the **Maintenance** tile.



The **Maintenance Methodology for Asset: []** screen will be displayed.

- In this screen, you can **Add, Edit** or **Delete** a maintenance methodology as required.

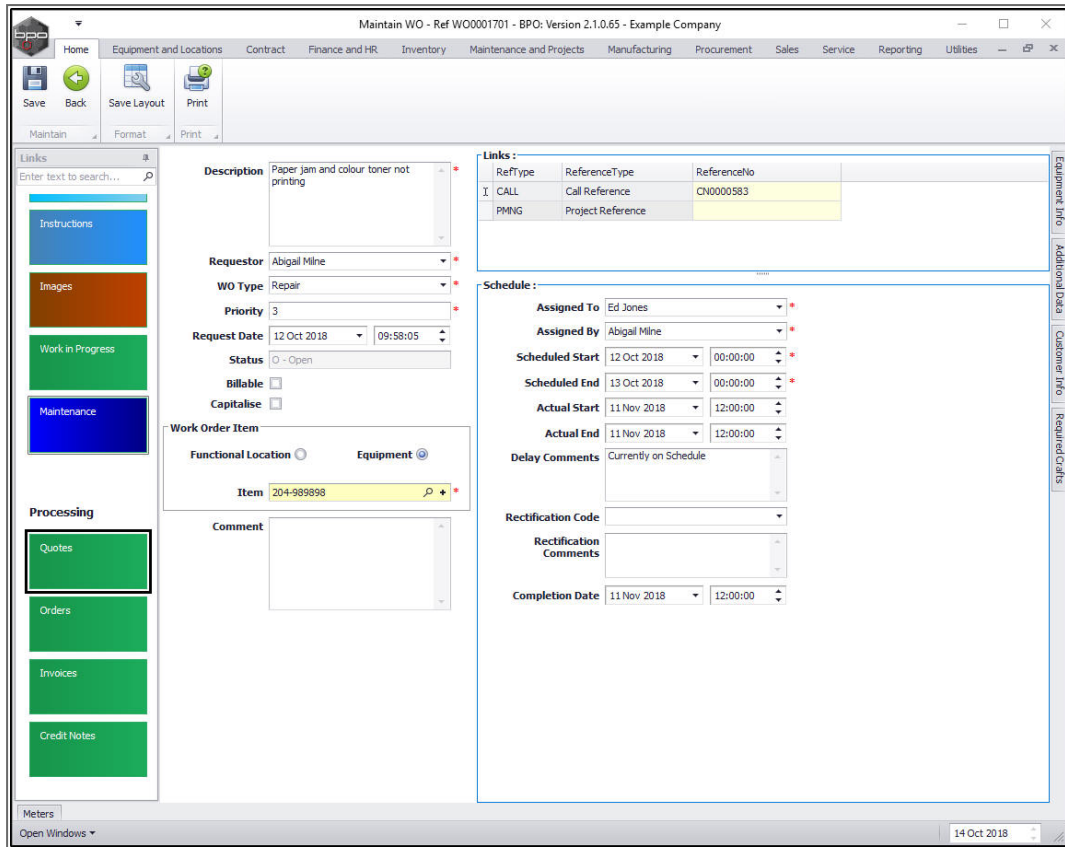


| TaskNum | TaskDesc | ScheduleType | ScheduleTypeDesc | MeterCode | Units | ServiceEvery | LastPerfDate | NextPerfDate | IncludeWeekEnds | IncludeHolidays | ExactInter... | MinBoundary | MaxBoundary | NoOfTimesCom |
|---------|-----------------|--------------|------------------|-----------|-------|--------------|--------------|--------------|-----------------|-----------------|---------------|-------------|-------------|--------------|
| 3MS | 3 Month Service | T | Time | | m | 3.00 | 11 Oct 2018 | 10 Jan 2019 | Yes | Yes | Yes | 0.00 | 0.00 | |

THE PROCESSING TILES

Quotes

- In the **Maintain WO - Ref []** screen, click on the **Quotes** tile.



The **Sales Quotes for Work Order []** screen will be displayed.

- Here you can view a list of the **sales quotes** linked to the selected work order.
- In this screen you can **Add, Edit, Delete** or **View** a selected sale quote.
- You can also **Accept, Reject** or **Convert** the sales quote to an order as required.

Sales Quotes for Work Order WO0001701 - BPO: Version 2.1.0.65 - Example Company

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

Add | Edit | Delete | View | Forward | Accepted | Rejected | Convert Order | Print | Export | Save Layout | Workspaces | Durban | New quote | Refresh

Maintain | Navig... | Process | Print | Format | Current

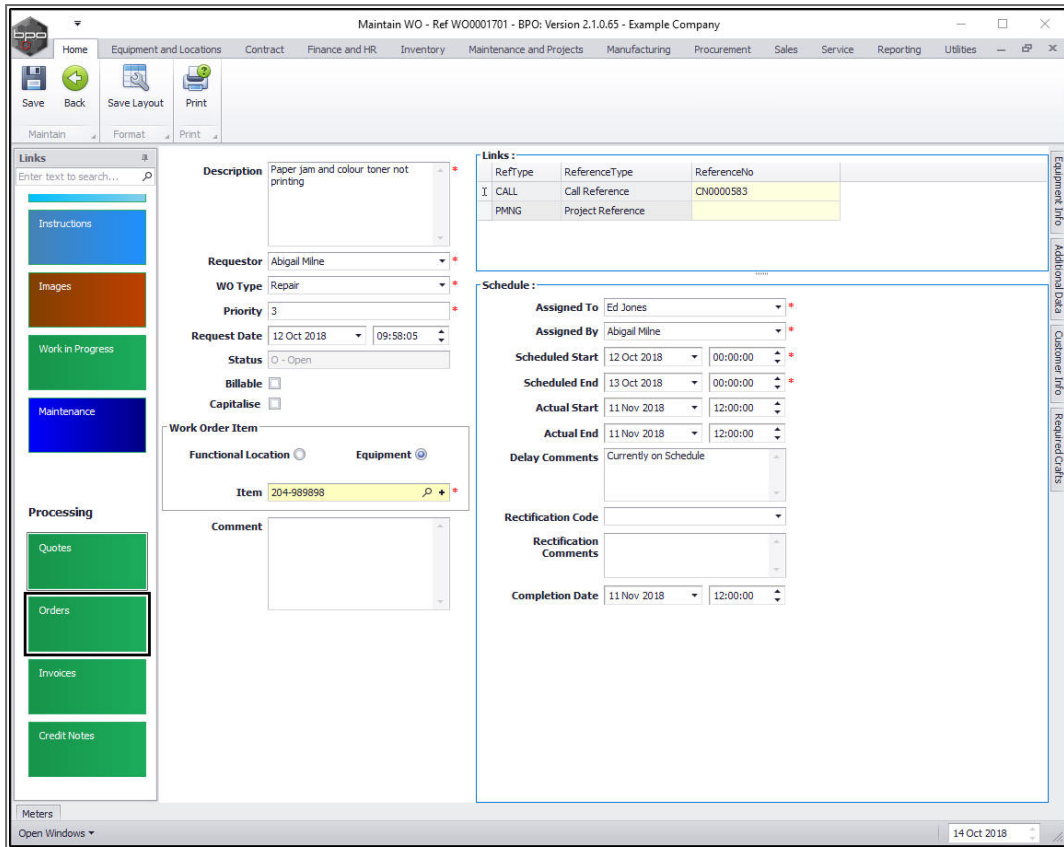
Drag a column header here to group by that column

| QuoteReference | CustomerCode | CustomerName | QuoteDescription | QuoteValue | Currency | ExchangeRate | TaxRate | QuoteDate | SalesmanName | Comments | QuoteStatus | Status |
|----------------|--------------|--------------|------------------|------------|----------|--------------|---------|-------------|---------------|---|-------------|--------|
| QT0000207 | HOP001 | Hope Works | QAB11/10/2018 | 1 398.40 | ZAR | 1.00 | 15.00 | 12 Oct 2018 | Abigail Mline | Call out to service printer exchange machine. | N | A |

Open Windows | 14 Oct 2018

Orders

- In the **Maintain WO - Ref []** screen, click on the **Orders** tile.



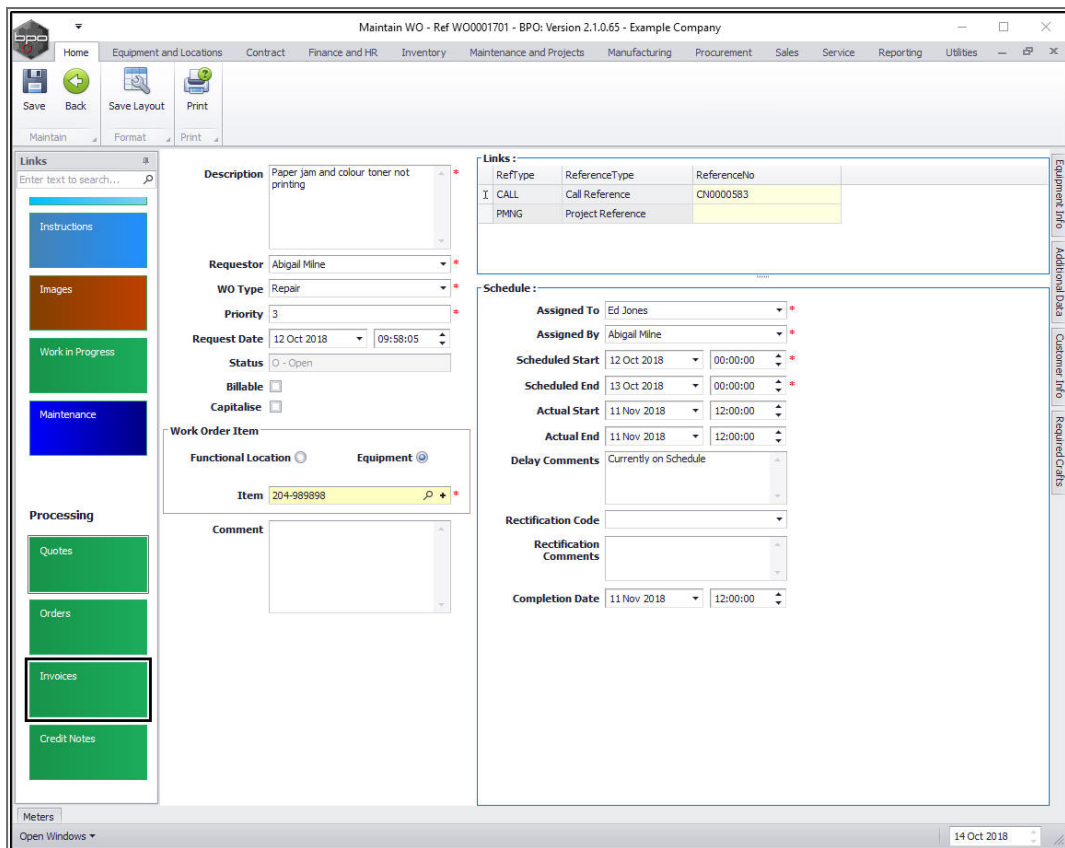
The **Sales Orders for Work Order []** screen will be displayed.

- Here you can view a list of the **sales orders** linked to the selected work order.
- In this screen you can **Add, Edit, Delete** or **View** sales quotes as required. You can also **Create an invoice, Create a New Deal Sale** or **Project** and **Add Items** to the linked work order as required.

| OrderNo | CustomerCode | CustomerName | DeptCode | DeptName | OrderStatusDesc | OrderDescription | OrderValue | Currency | ExchangeRate | TaxRate | OrderDate | SalesmanName | Comments | Status |
|-----------|--------------|--------------|----------|-----------|-----------------|------------------|------------|----------|--------------|---------|-------------|---------------|----------|--------|
| OR0000239 | HOP001 | Hope Works | Tech | Technical | New order | OAB11/10/2018 | 517.50 ZAR | | 1.00 | 15.00 | 12 Oct 2018 | Abigail Milne | | A |

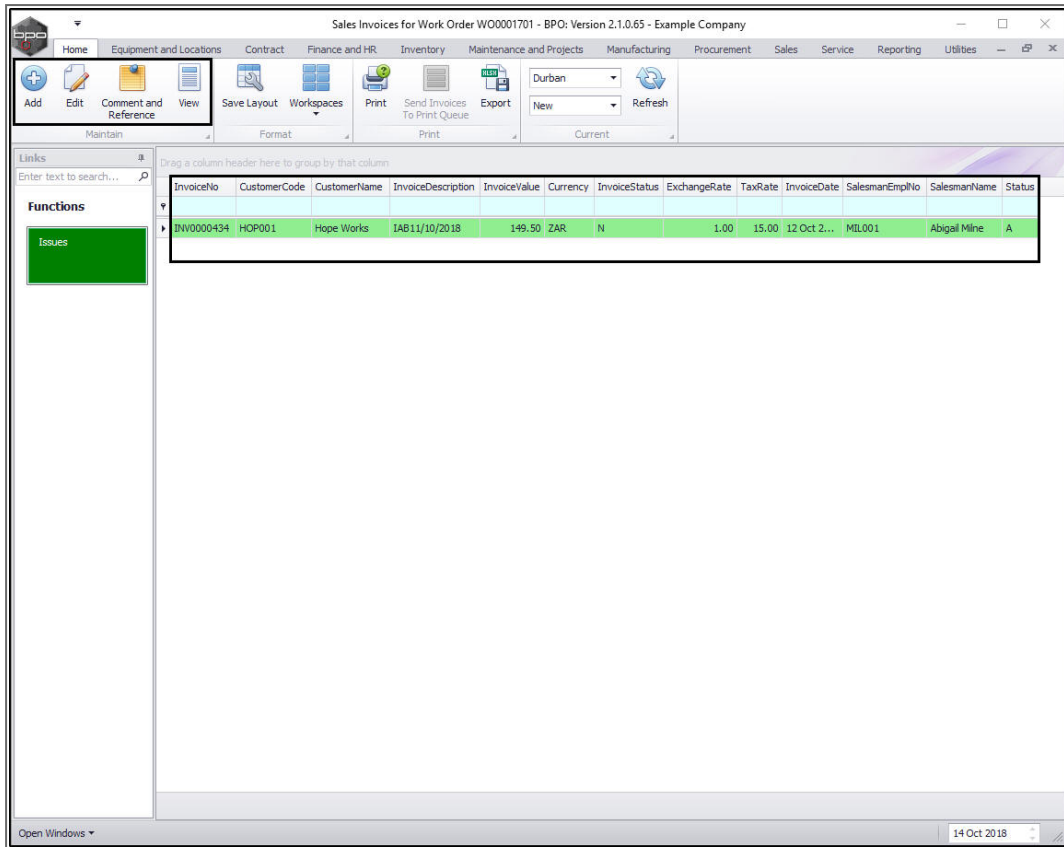
Invoices

- In the **Maintain WO - Ref []** screen, click on the **Invoices** tile.



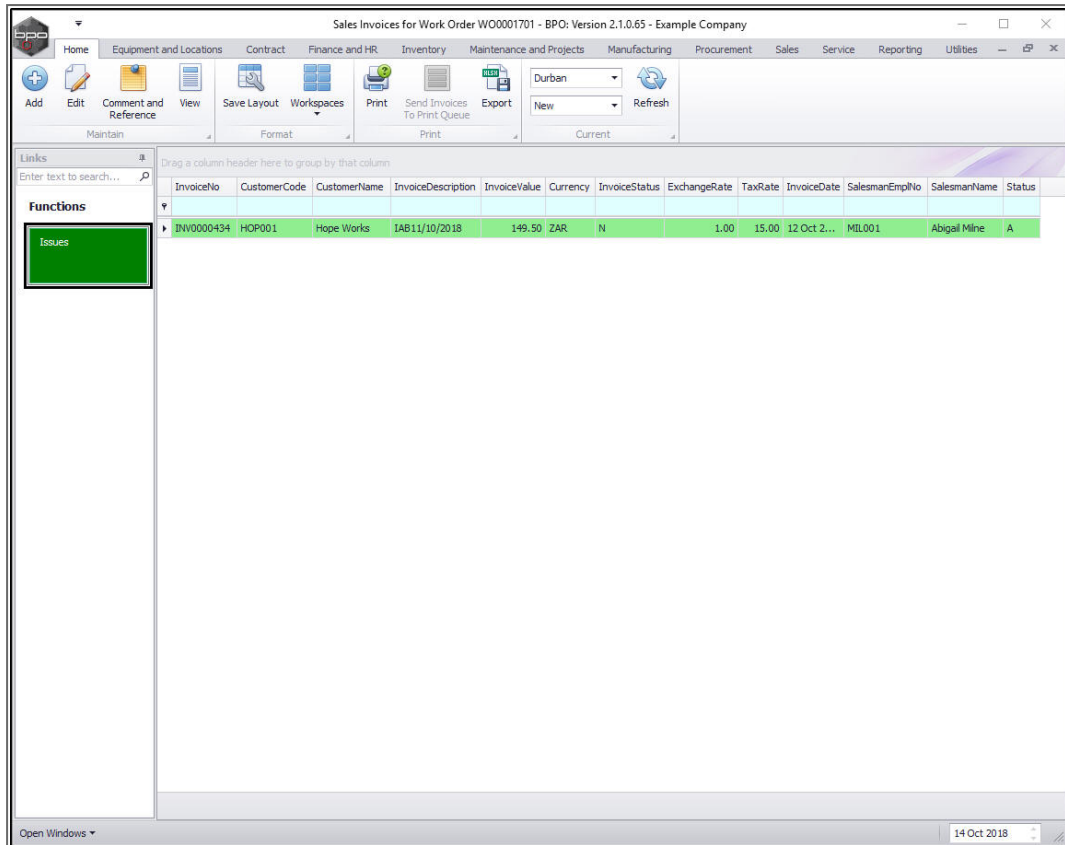
The **Sales Invoices for Work Order []** screen will be displayed.

- Here you can view a list of the **sales invoices** linked to the selected work order.
- In this screen you can **Add, Edit**, record **Comments** and **References** and **View** sales invoices as required.



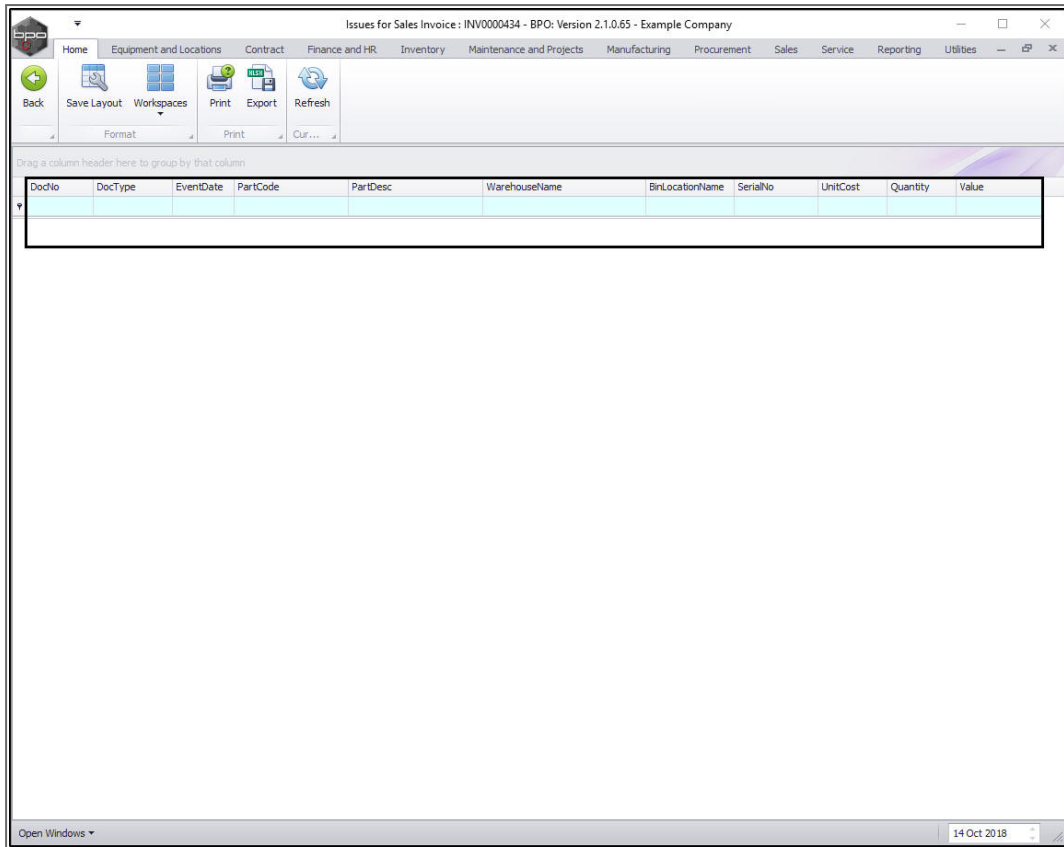
Issues

- Click on the **Issues** tile in this screen.



The **Issues for Sales Invoice: []** screen will be displayed.

- If there are any **part issues** linked to the selected sales invoice, they will be listed in this screen.



Issues for Sales Invoice : INV000434 - BPO: Version 2.1.0.65 - Example Company

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

Back Save Layout Workspaces Print Export Refresh

Format Print Cur...

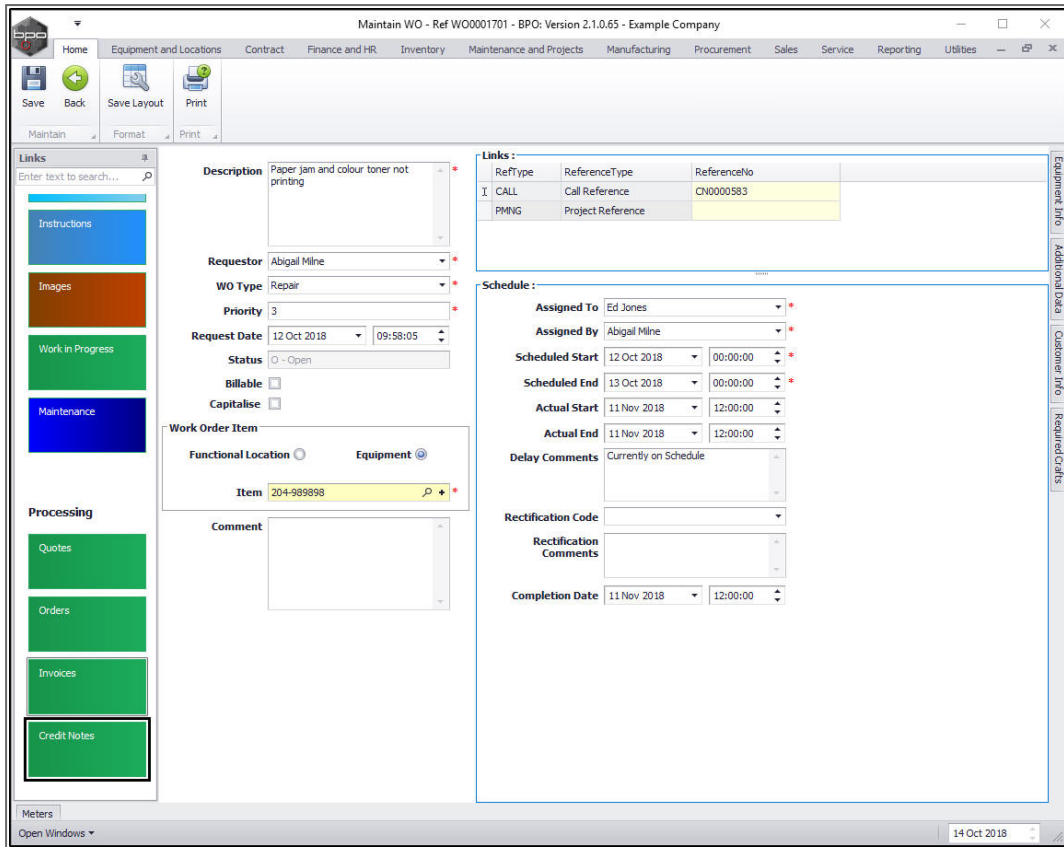
Drag a column header here to group by that column

| DocNo | DocType | EventDate | PartCode | PartDesc | WarehouseName | BinLocationName | SerialNo | UnitCost | Quantity | Value |
|-------|---------|-----------|----------|----------|---------------|-----------------|----------|----------|----------|-------|
|-------|---------|-----------|----------|----------|---------------|-----------------|----------|----------|----------|-------|

Open Windows 14 Oct 2018

Credit Notes

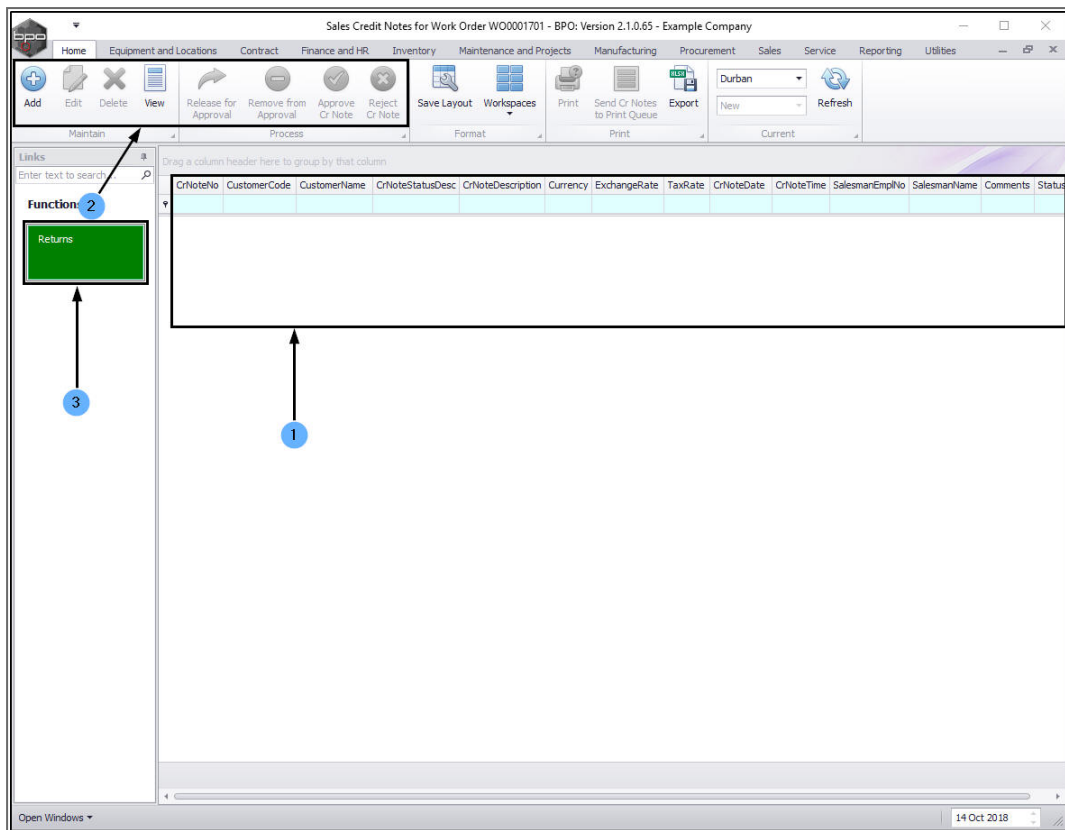
- In the **Maintain WO - Ref []** screen, click on the **Credit Notes** tile.



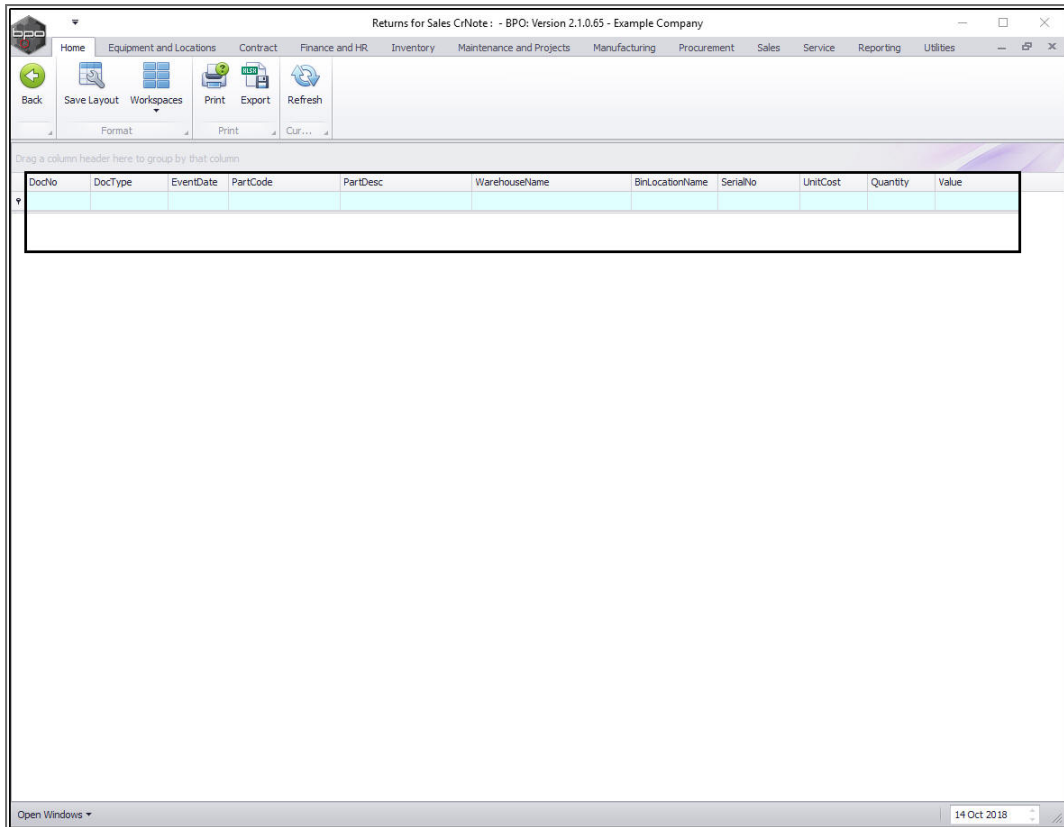
1. The **Sales Credit Notes for Work Order []** screen will be displayed.
2. Here you can **Add, Edit, Delete, View, Release for Approval, Remove from Approval, Approve** or **Reject** the selected credit note.

Returns

- Click on the **Returns** tile



- The **Returns for Sales Cr Note** screen will be displayed.
- If there is a **part return** linked to the selected sales credit note, then this will be listed in this screen.



THE WORK REQUESTS FRAME

- Go back to the **My Work** Listing screen and click on the **Work Requests** tab
- A list of **work requests** assigned to this specific employee will be displayed.
 - Note: A work request can be raised if additional work is required, which can be viewed and approved / rejected by a supervisor or manager and will then become a work order.

My Work - BPO: Version 2.1.0.65 - Example Company

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

Processing | Format | Print | View | Export | Current

Work Orders | **Work Requests**

Drag a column header here to group by that column

| WRCode | Description | WOType | WOTypeDesc | Status | Priority | AssigneeNumber | EmployeeNumber | RequestorType | RequestDate | RequestTime | ScheduledStartDate | ScheduledFinishDate |
|-----------|---|--------|------------|--------|----------|----------------|----------------|---------------|-------------|-------------|--------------------|---------------------|
| WR0000054 | New drum requested to complete repair requirements. | DR | Default | O | 2 | ML001 | SHA001 | 2 | 22 May 2018 | 04:10:24 | 22 May 2018 | 22 May 2018 |
| WR0000057 | Service Request | SERV | | O | 2 | ML001 | SHA001 | 1 | 10 Jul 2018 | 13:23:23 | 10 Jul 2018 | 10 Jul 2018 |

Open Windows | 14 Oct 2018

BPO.MNU.073