

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

## SALES

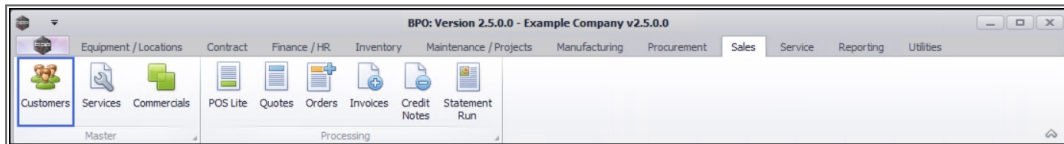
### CUSTOMERS – CALL HISTORY

The **Call History** tile can be found in both the Customer Listing and the Customer Maintain screen. This tile will direct you to a data grid of history regarding Calls linked to a specific customer.

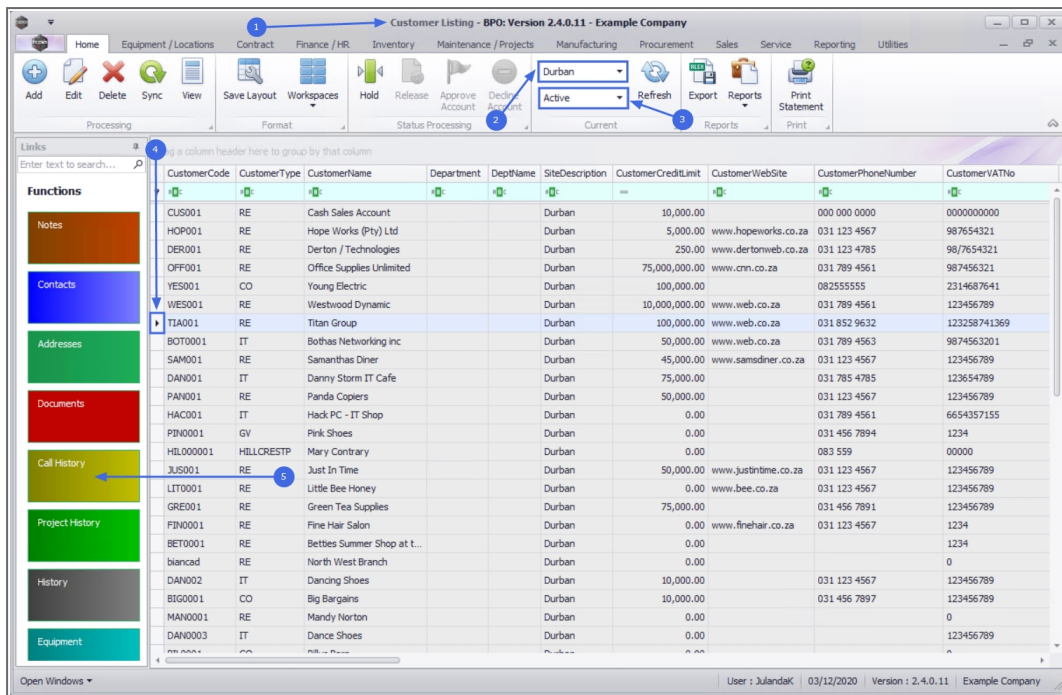
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**Ribbon Access:** Sales > Customers

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1. The **Customer Listing** screen will display.
2. Select the **Site** where the customer can be located.
  - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Active**.
4. Click in the **row** of the customer for whom you wish to view the **Call History** for.
5. Click on the **Call History** tile.



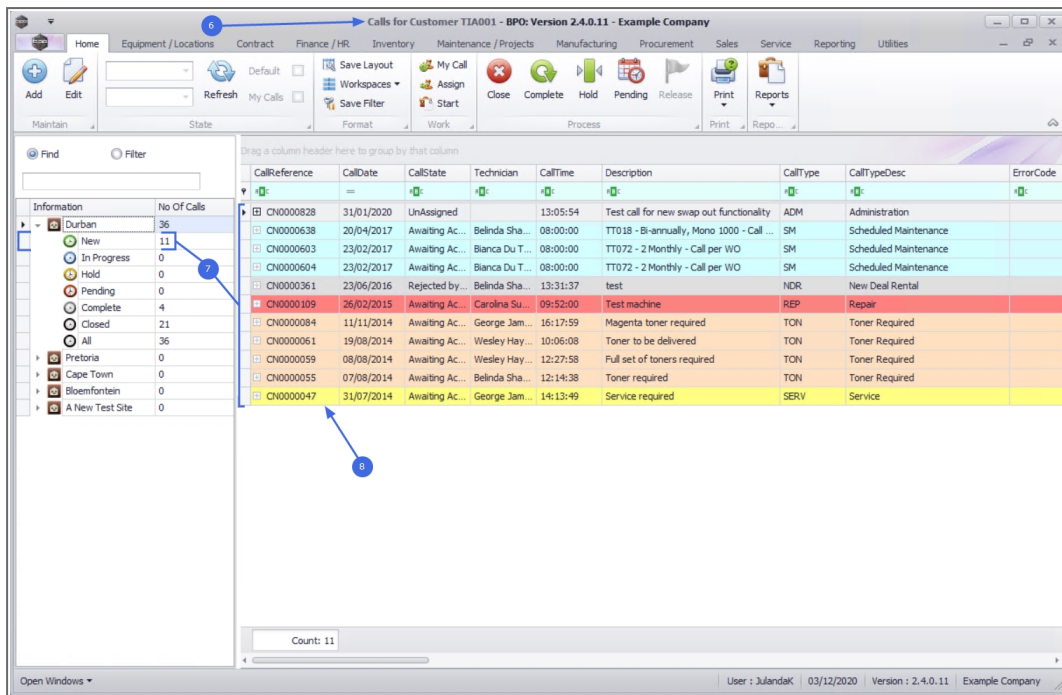
6. The **Calls for Customer** [customer code] screen will display.

## CALLS DATA GRID

- By default, all **New** calls linked for the selected customer will display.
- The Calls are colour-coded by **Call Type**, e.g. all **Service** Calls are displayed as **yellow**.

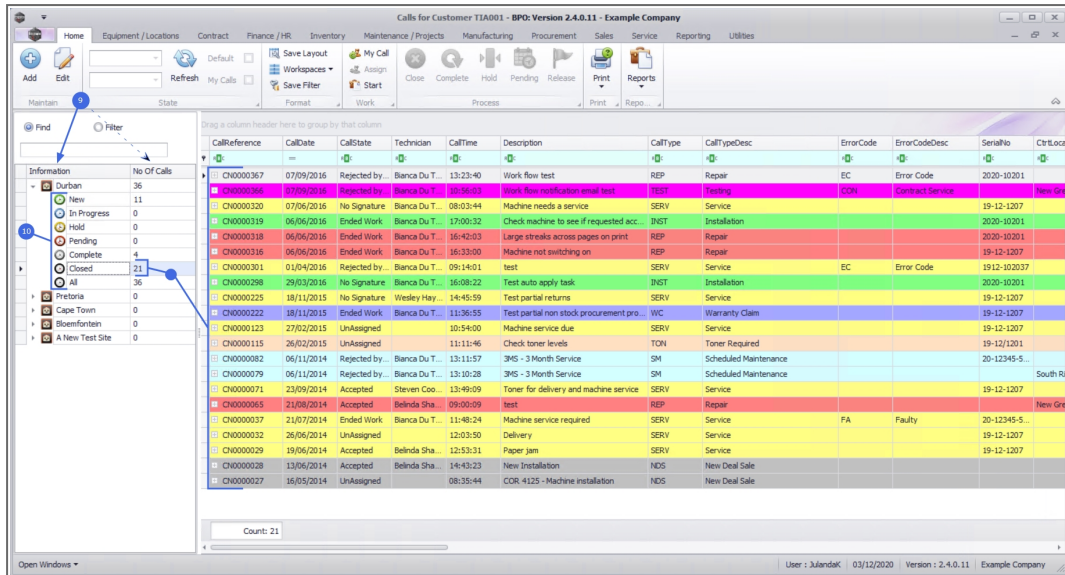


**Call Type Colours** can be configured according to your company requirements.



## INFORMATION PANEL

9. The **Information** panel lists the number of calls for each Call Status.
10. You can select to view any Call Status, by clicking on one of the **Call Status** discs on the left of the panel.
  - The example has the **Closed** Call Status selected and all the Closed calls for the customer are displayed in the **Calls for Customer** data grid.



## FIND OPTION

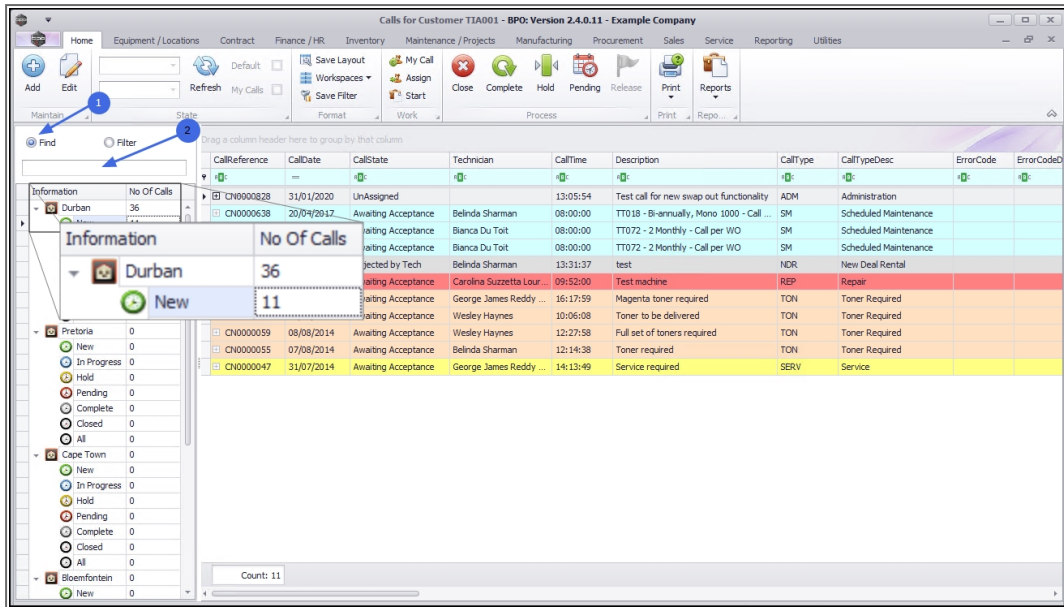
The Find option allows you to search for a specific Call, regardless of site, status or date range, using the **Call Reference** number.

1. Make sure that the '**Find**' radio button is selected.
2. In the text box, type in the full **Call Reference** number that you wish to find, then press **Enter**.



Note that the example is currently open in the Durban Site and the Status is set to New.





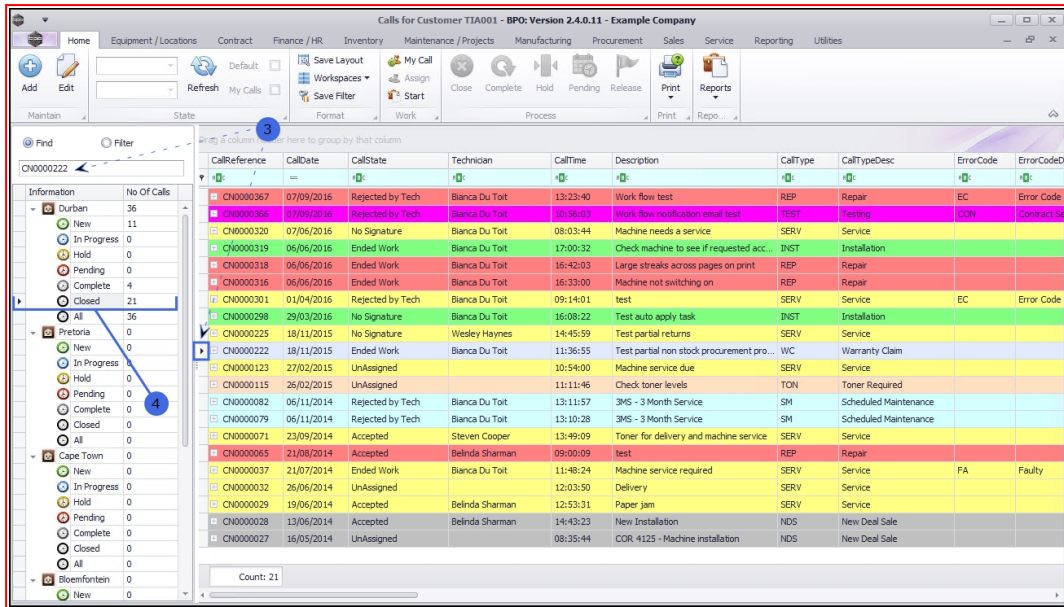
3. The example is set to search for **CN0000222**.

- The system has filtered for this Call Reference number and selected it.

4. The search has resulted in the Call being located in the **Closed** status.



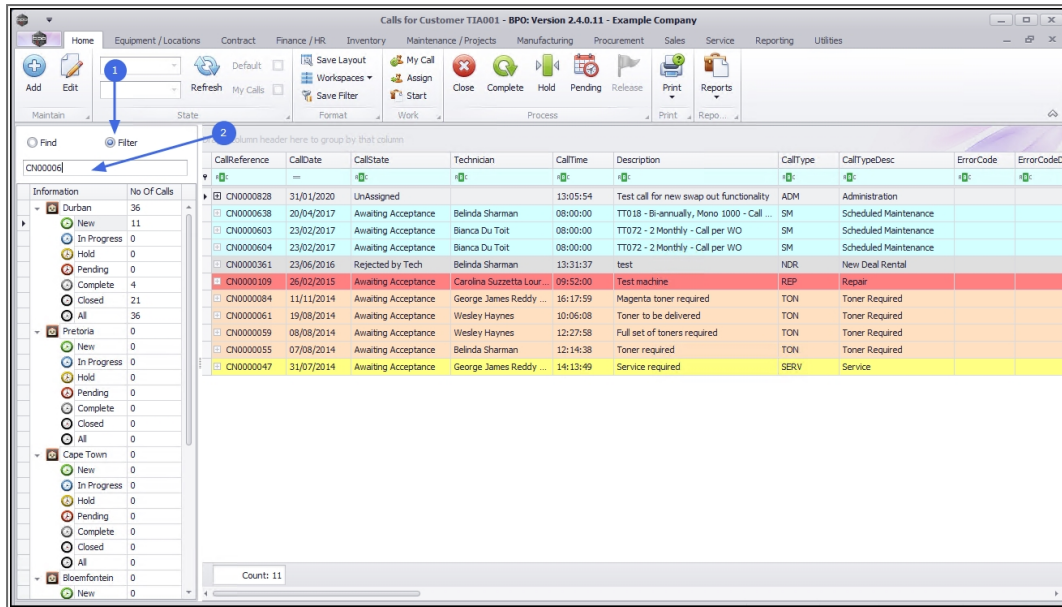
Note that if the full reference number is not entered, the system will not be able to search for the specific Call and will return an error message.



## FILTER OPTION

The Filter option allows you to specify a range of Calls by typing the prefix or part of the Call Reference number.

1. Make sure that the '**Filter**' radio button is selected.
2. Type the **Call Reference** number up to the point where you would like to display the range and press **Enter**.

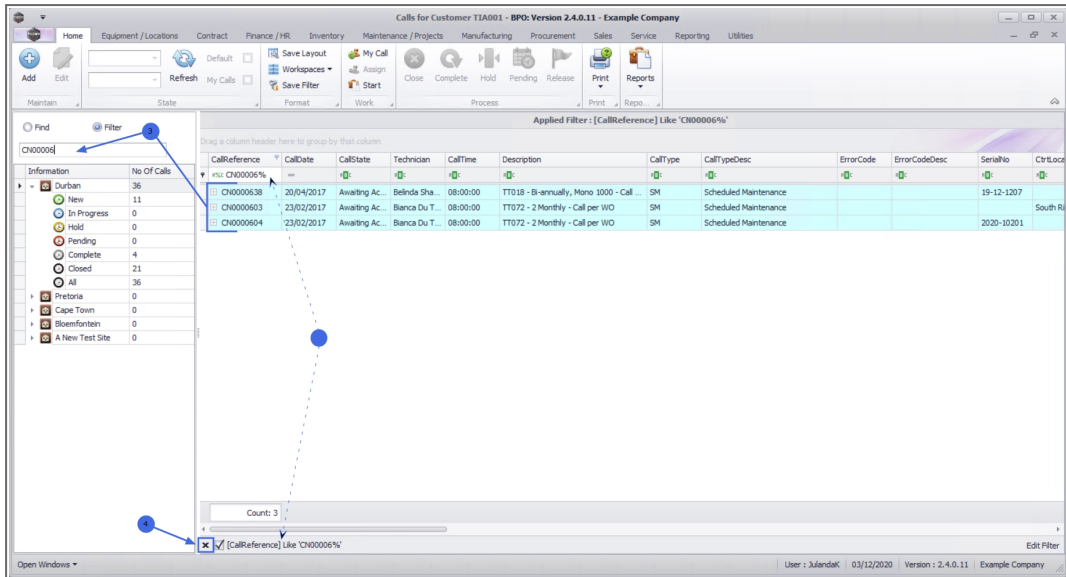


- The example has the Reference **CN00006** entered, which will search for and display all the Call References that start with CN00006.



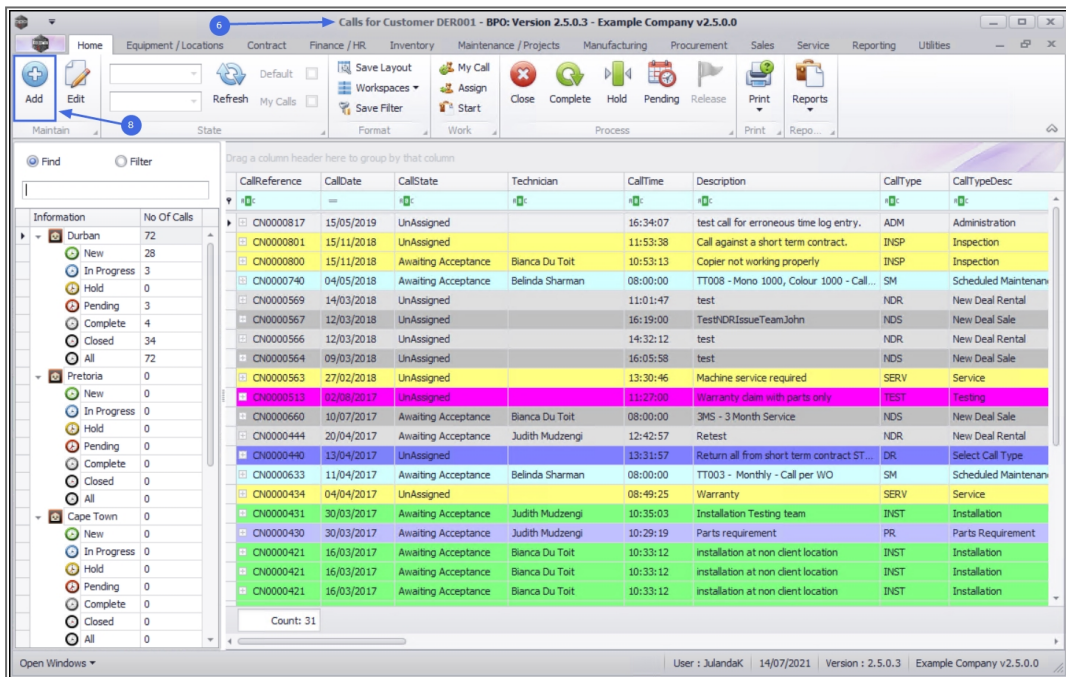
Note that the Call Reference column filter row added the '%' variable at the end of the Call Reference, and the Edit Filter row now contains the filter details: [Call Reference] Like 'CN00006%'.

- To **remove** the Filter, either, **Delete** or **backspace** over the text in the in the Filter Row of the **Call Reference** column, or click on the **[X]** in the **Edit Filter** row.

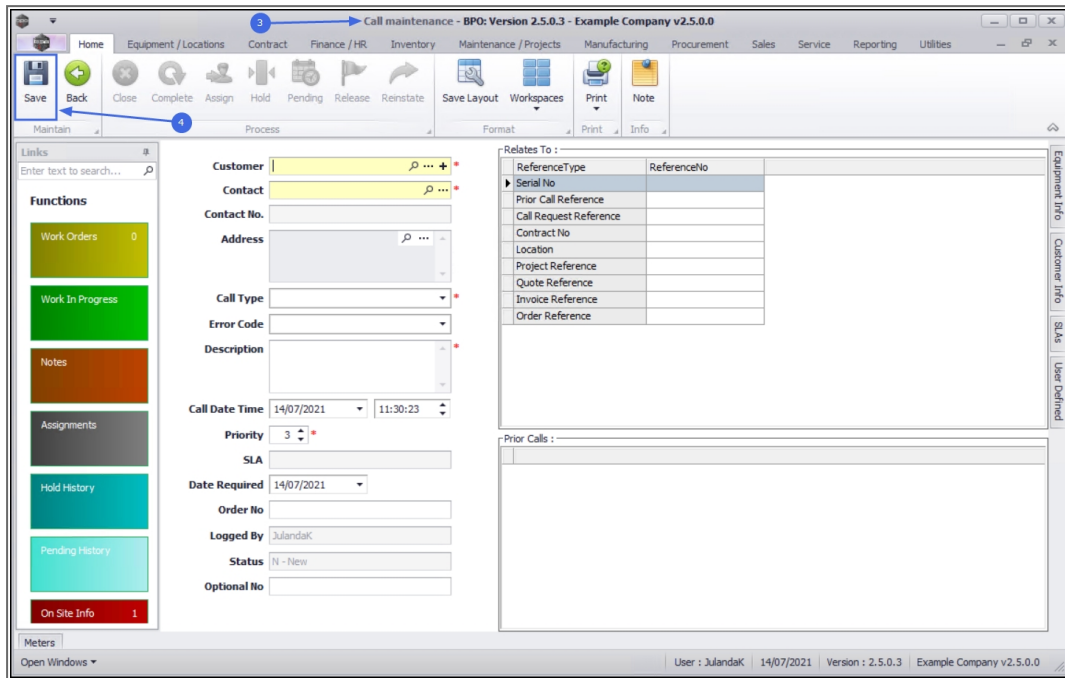


## LOG A CALL

1. From the **Calls for Customer** [customer code] screen,
2. Click on **Add**.



3. "The Call maintenance screen will be displayed." on page 4
4. Complete the Call information for the Customer and click on **Save**.



## EDIT A CALL

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site** and **Call Status**.
  - The example has **Durban** and **New** call status selected.
3. Click on the **row** of the Call you wish to edit.
4. Click on **Edit**.

1. Save

2. Find

3. Click a column header here to group by that column

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration
CN0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CN0000800	15/11/2018	Awaiting Acceptance	Blanca Du Toit	10:53:13	Copier not working properly	INSP	Inspection
CN0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Maintenance
CN0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
CN0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
CN0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
CN0000564	09/03/2018	UnAssigned		16:05:58	test	NDS	New Deal Sale
CN0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
CN0000513	02/08/2017	UnAssigned		11:27:00	Warranty claim with parts only	TEST	Testing
CN0000660	10/07/2017	Awaiting Acceptance	Blanca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
CN0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
CN0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call Type
CN0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenance
CN0000434	04/04/2017	UnAssigned		08:49:25	Warranty	SERV	Service
CN0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
CN0000430	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:29:19	Parts requirement	PR	Parts Requirement
CN0000421	16/03/2017	Awaiting Acceptance	Blanca Du Toit	10:33:12	installation at non client location	INST	Installation
CN0000421	16/03/2017	Awaiting Acceptance	Blanca Du Toit	10:33:12	installation at non client location	INST	Installation
CN0000421	16/03/2017	Awaiting Acceptance	Blanca Du Toit	10:33:12	installation at non client location	INST	Installation

Count: 31

5. "Call Details" on page 4

6. Make the necessary changes to the Call information and click on **Save**.

5. Save

6. Save

Customer: **Derton / Technologies**

Contact: **Maggie Smart**

Contact No.: 031 123 4785

Address: 685 Silver Oak Road, Forest Hills, Upper Highway Area

Call Type: Administration

Error Code: [Empty]

Description: test call for erroneous time log entry.

Call Date Time: 15/05/2019 16:34:07

Priority: 3

SLA: [Empty]

Date Required: 15/05/2019

Order No: [Empty]

Logged By: BlancaD

Status: N - New

Optional No: [Empty]

ReferenceType	ReferenceNo
Serial No	2020-1111
Prior Call Reference	
Contract No	CO0000074
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

CallReference	CallDate	CallTime	Description
CN0000817	15/05/2019	16:34:07	test call for erroneous time log entry.



## STATE PANEL

In the State panel the following filters are not available in this view, because all the calls linked to the specific customer are displayed:

- **Start Date,**
- **End Date,**
- **Default** and
- **My Calls.**

The **Refresh** button will update the **Calls for Customer** screen with the latest version of the information. Any changes made from the ribbon will be updated in the Call List data grid.

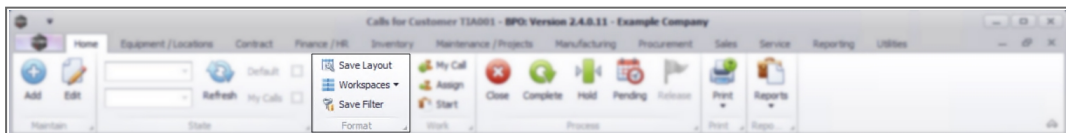


## FORMAT PANEL

Any changes that you may have made to the **Calls for Customer** screen e.g. changing the column order or resizing columns, will return to the original layout when you exit the screen. By clicking on **Save Layout**, **Workspaces** or **Save Filter** in the **Format** panel, will save your settings for the next time you select a customer and open this screen.



[For a detailed handling of this topic refer to BPO2 Data Grid Layouts](#)





## MY CALL

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site** and the **Call Status**.
  - The example has **Durban** and **New** call status selected.
3. Click on the **row** of the Call you wish to assign to yourself.

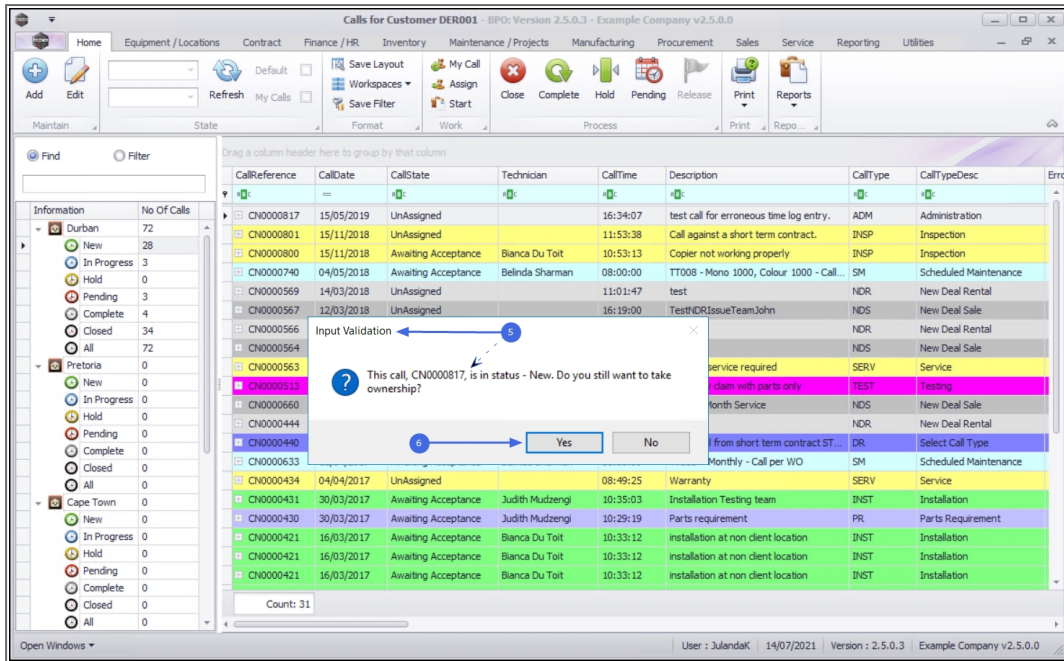


Note that the Technician field is currently empty and the Call State is **UnAssigned**.

4. Click on **My Call**.

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH0000817	15/05/2019	UnAssigned		16:34:07	test call for erroneous time log entry.	ADM	Administration
CH0000801	15/11/2018	UnAssigned		11:53:38	Call against a short term contract.	INSP	Inspection
CH0000800	15/11/2018	UnAssigned		10:53:13	Copier not working properly	INSP	Inspection
CH0000740	04/05/2018	Awaiting Acceptance	Belinda Sharman	08:00:00	TT008 - Mono 1000, Colour 1000 - Call...	SM	Scheduled Maintenance
CH0000569	14/03/2018	UnAssigned		11:01:47	test	NDR	New Deal Rental
CH0000567	12/03/2018	UnAssigned		16:19:00	TestNDRIssueTeamJohn	NDS	New Deal Sale
CH0000566	12/03/2018	UnAssigned		14:32:12	test	NDR	New Deal Rental
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CH0000563	27/02/2018	UnAssigned		13:30:46	Machine service required	SERV	Service
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CH0000660	10/07/2017	Awaiting Acceptance	Bianca Du Toit	08:00:00	3MS - 3 Month Service	NDS	New Deal Sale
CH0000444	20/04/2017	Awaiting Acceptance	Judith Mudzengi	12:42:57	Retest	NDR	New Deal Rental
CH0000440	13/04/2017	UnAssigned		13:31:57	Return all from short term contract ST...	DR	Select Call Type
CH0000633	11/04/2017	Awaiting Acceptance	Belinda Sharman	08:00:00	TT003 - Monthly - Call per WO	SM	Scheduled Maintenance
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CH0000431	30/03/2017	Awaiting Acceptance	Judith Mudzengi	10:35:03	Installation Testing team	INST	Installation
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CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation
CH0000421	16/03/2017	Awaiting Acceptance	Bianca Du Toit	10:33:12	installation at non client location	INST	Installation

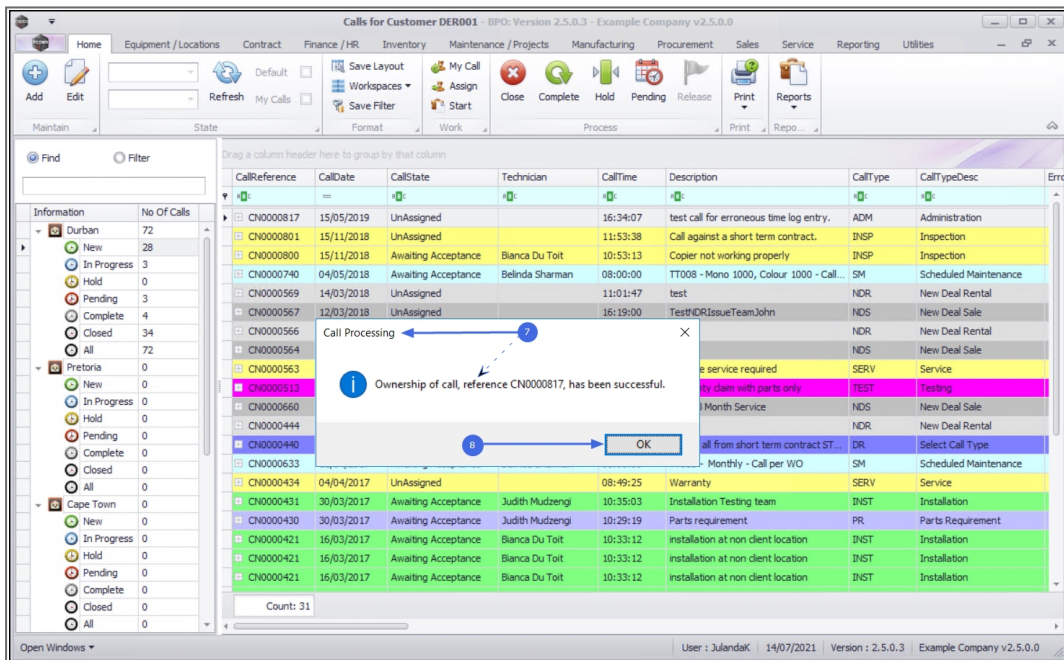
5. When you receive the **Input Validation** message to confirm;
  - **This call, [call ref number], is in status - [status]. Do you still want to take ownership?**
6. Click on **Yes**.



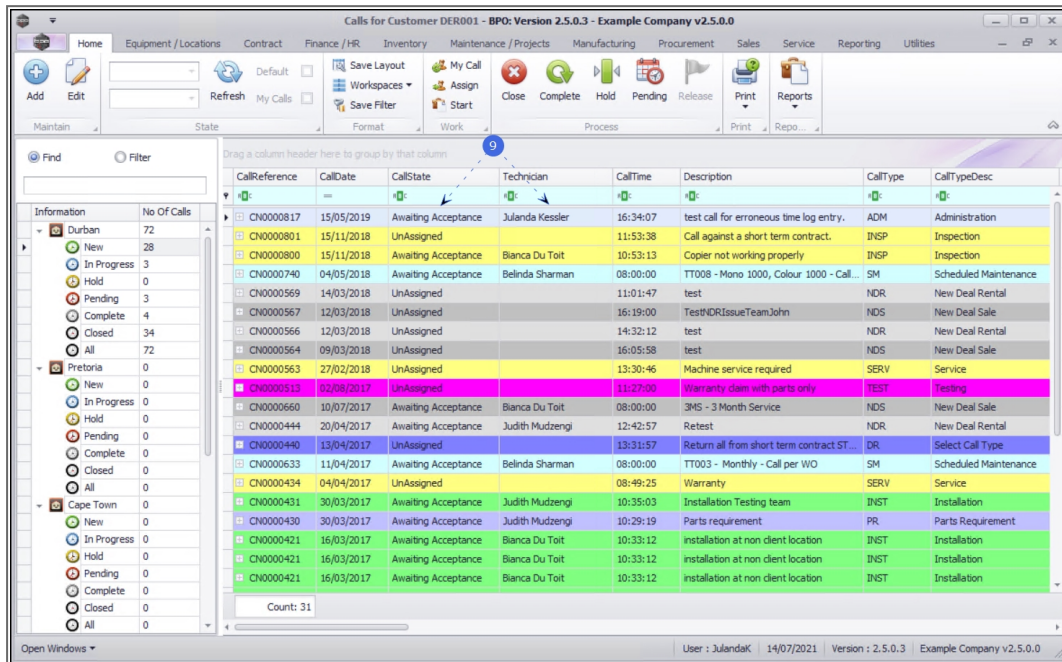
7. Next you will receive the **Call Processing** message to confirm;

- **Ownership of call, reference [call ref number], has been successful.**

8. Click on **OK**.



- The call has now been updated with the name of the **Technician** currently logged on to the system and the **Call Status** has changed to **Awaiting Acceptance**.



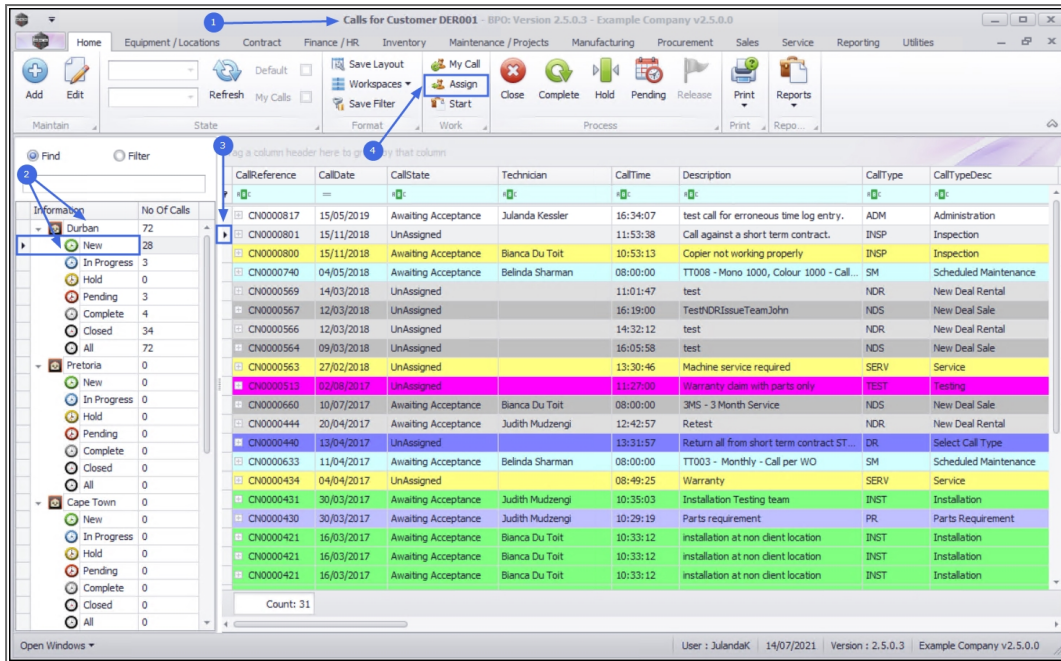
## ASSIGN A CALL

By assigning an employee to a call, will move the call to the **In Progress** status. By assigning the call to a **Technician**, **Driver**, or **Responsible Person** will identify who will be working on the call.

- From the **Calls for Customer** [customer code] screen,
- Select the **Site** and the **Call Status**.
  - The example has **Durban** and **New** call status selected.
- Click on the **row** of the Call you wish to assign.

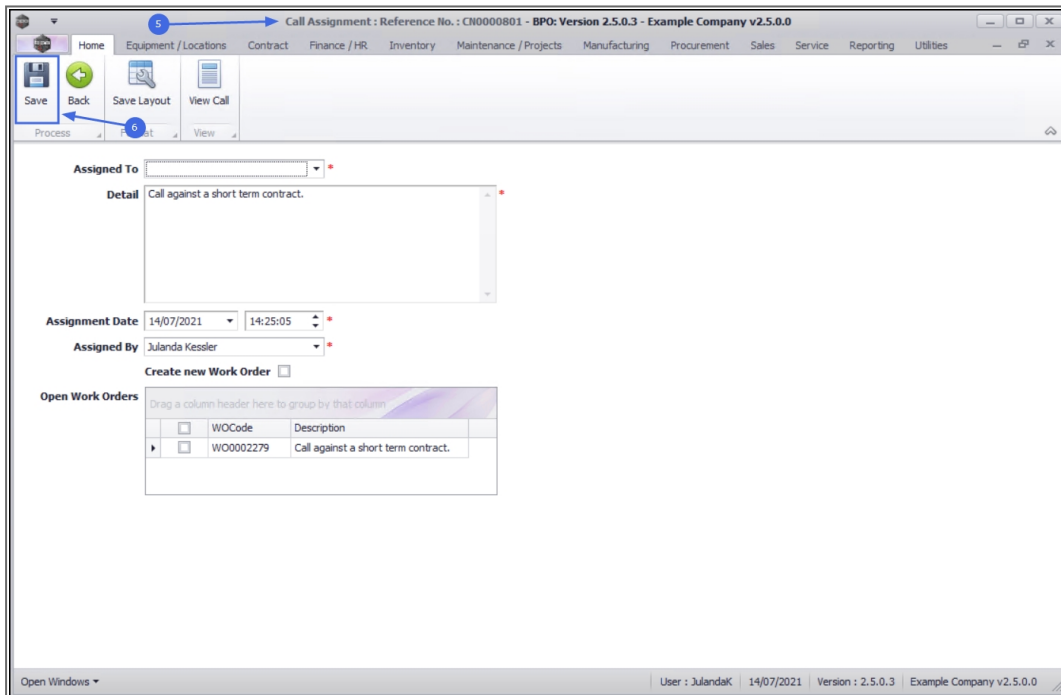
Note that the **Technician** field is currently empty and the **Call State** is **UnAssigned**.

- Click on **Assign**.



5. "The Call Assignment: Reference No: [call ref number] screen will be displayed." on page 4

6. Complete the Call Assignment information and click **Save** when done.

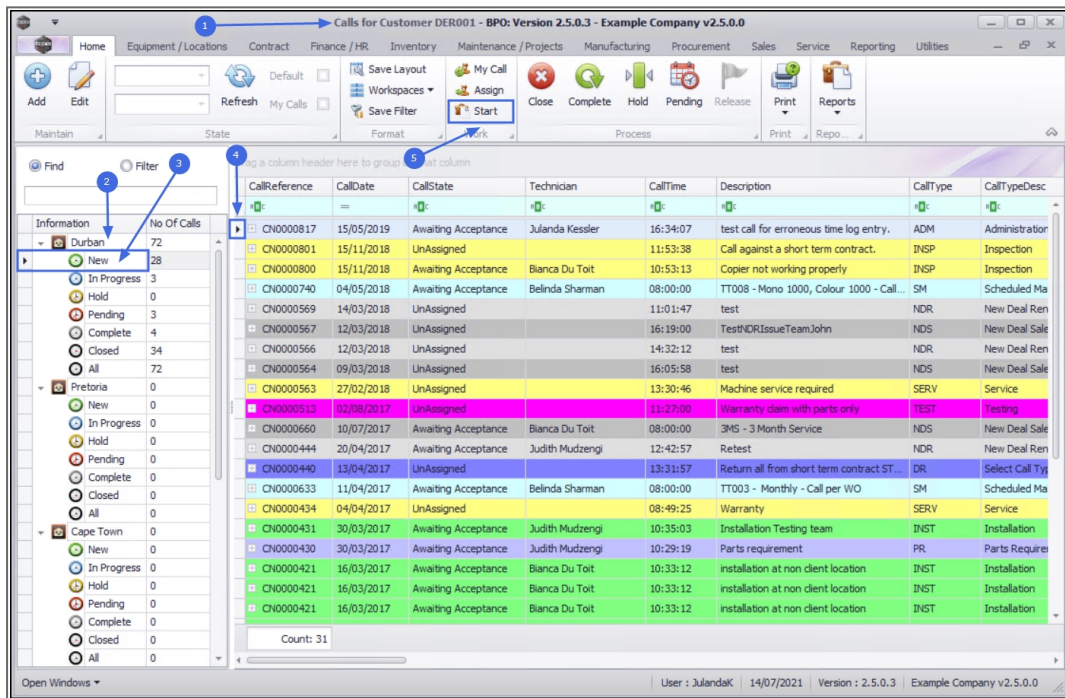




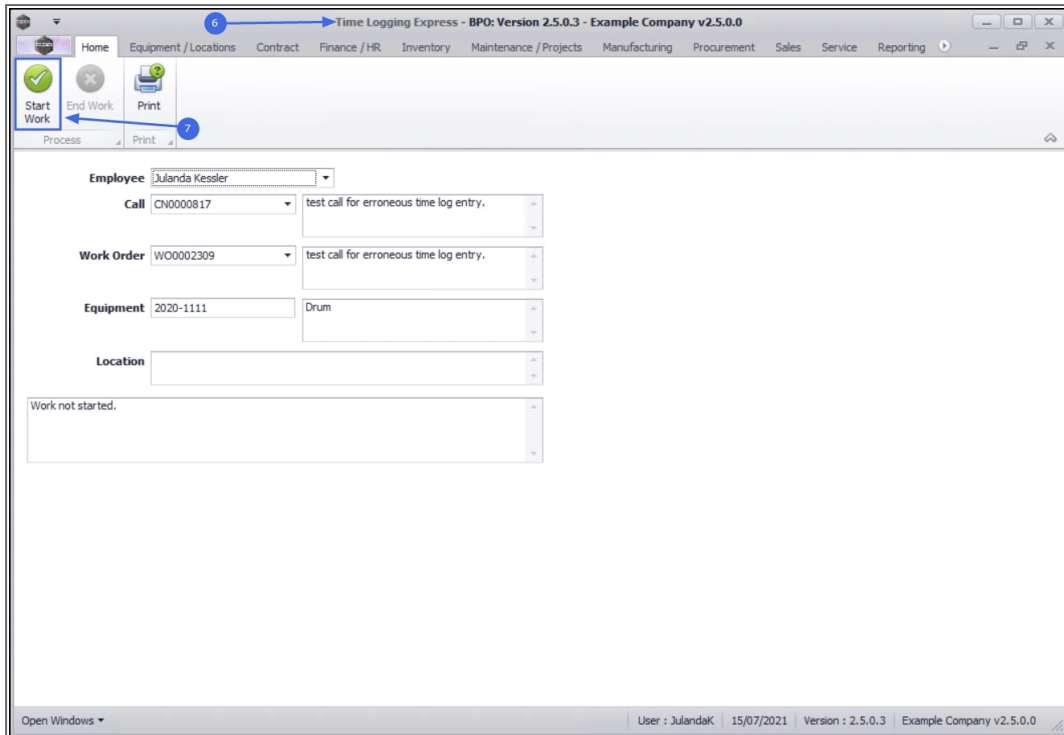
## START WORK

Use the **Start Work** feature to **Start** and **End** work on Calls that you are working on. A Call must be in the **New** status to **Start Work**, and will then move to the **In Progress** status where you can continue the process until **End Work**.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site**.
  - The example has **Durban** selected.
3. Ensure that the **Call Status** is set to **New**.
4. Click on the **row** of the Call you wish to start work on.
5. Click on **Start**.



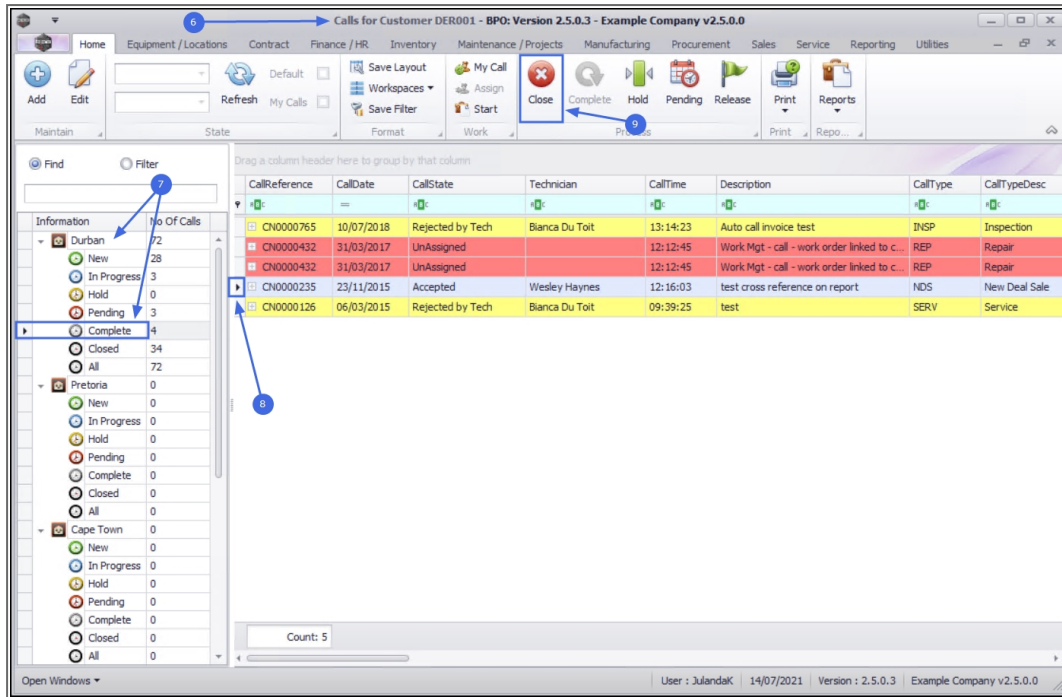
6. " The Time Logging Express screen will be displayed." on page 3
7. Complete the Time logging screen and click on **Start Work**.



## CLOSE A CALL

When a call has been closed, it cannot be re-opened, and can only be viewed. You will receive a notification when trying to close a Call that have outstanding items, such as billable items not yet invoiced, linked to the call.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site** and **Call Status**.
  - The example has **Durban** selected and the status has been set to **Complete**.
3. Click on the **row** of the Call you wish to close.
4. Click on **Close**.

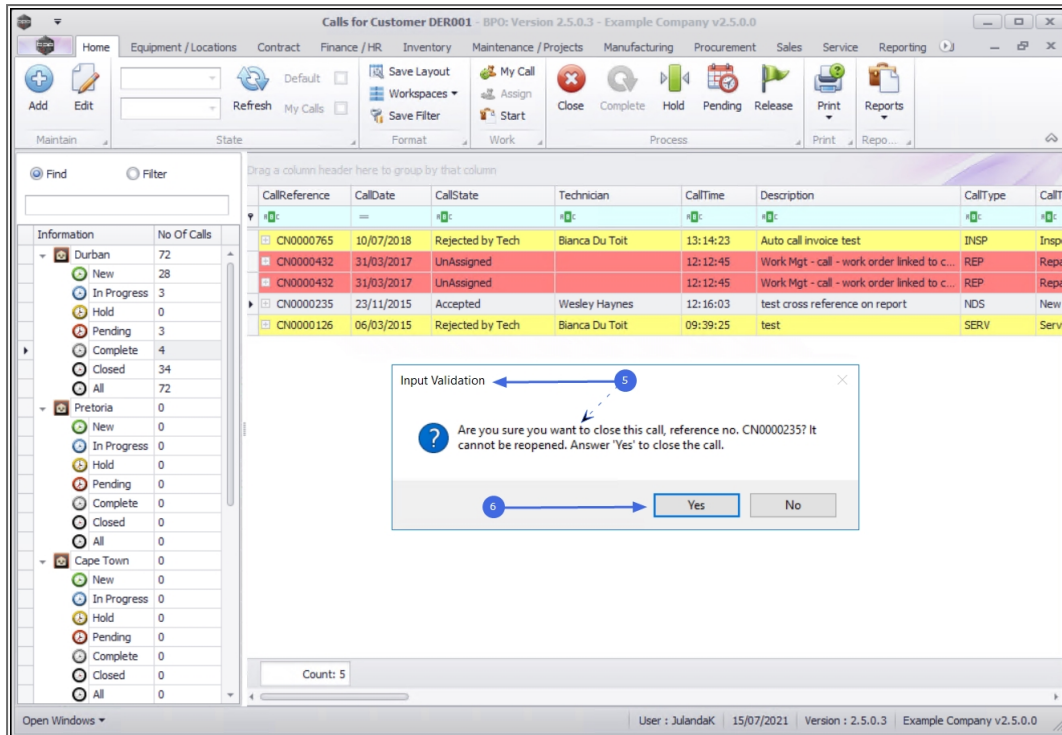


5. When you receive the **Input Validation** message to confirm;
  - **Are you sure you want to close this call, reference no. [call ref number]? It cannot be reopened. Answer 'Yes' to close the call.**
6. Click on **Yes**.



For a detailed handling of this topic refer to Calls - Close a Call

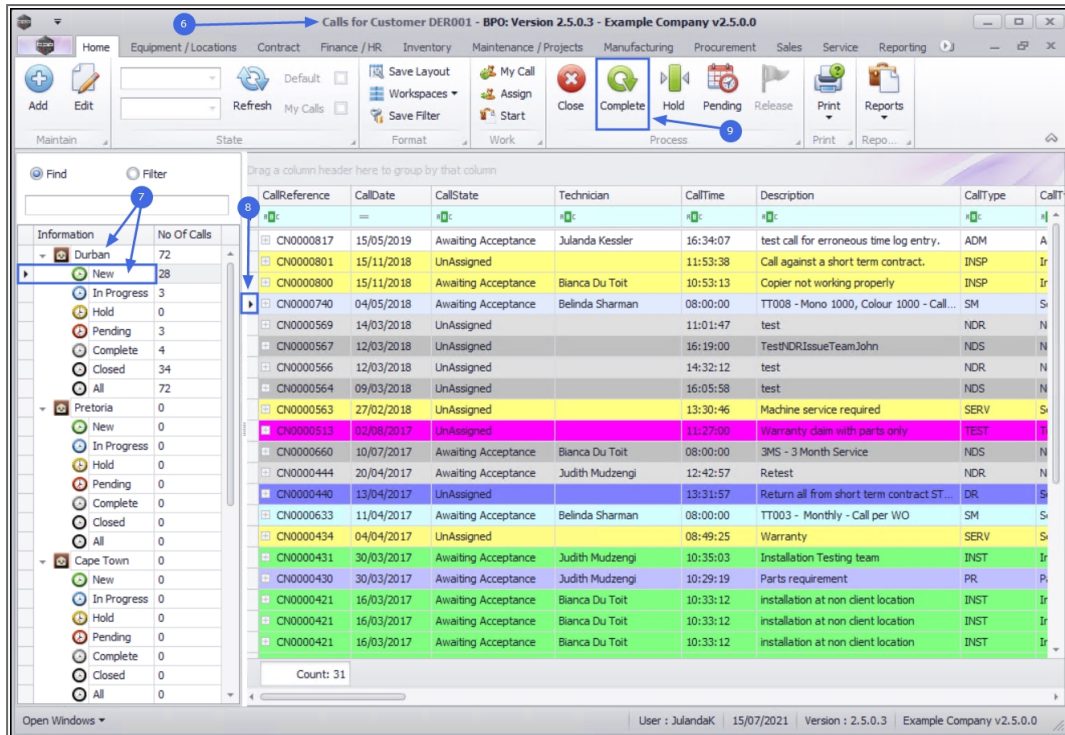




## COMPLETE A CALL

Once the Technician has completed the work required, the call can be set to Completed.

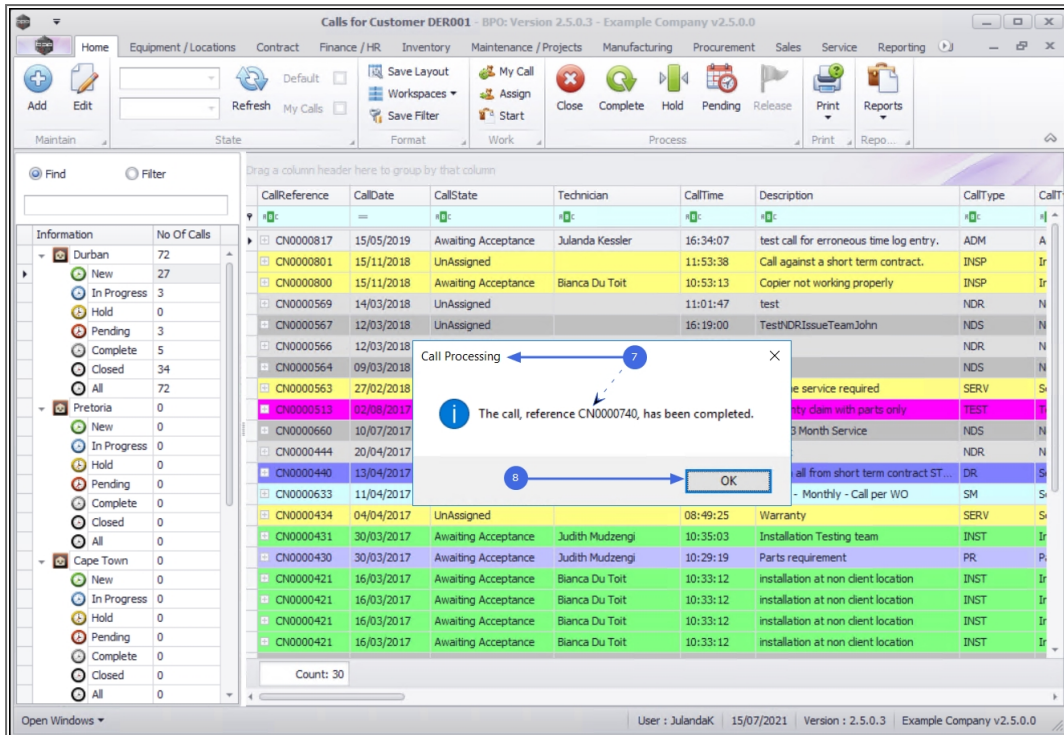
1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site** and **Call Status**.
  - The example has **Durban** selected and the call status is **New**.
3. Click on the **row** of the Call you wish to complete.
4. Click on **Complete**.



5. When you receive the **Input Validation** message to confirm;
  - **Are you sure you want to complete this call, reference no. [call ref number]? Answer 'Yes' to complete the call.**
6. Click on **Yes**.

7. Next you will receive the **Call Processing** message to confirm that;
  - **The call, reference [call ref number], has been completed.**
8. Click on **OK**.

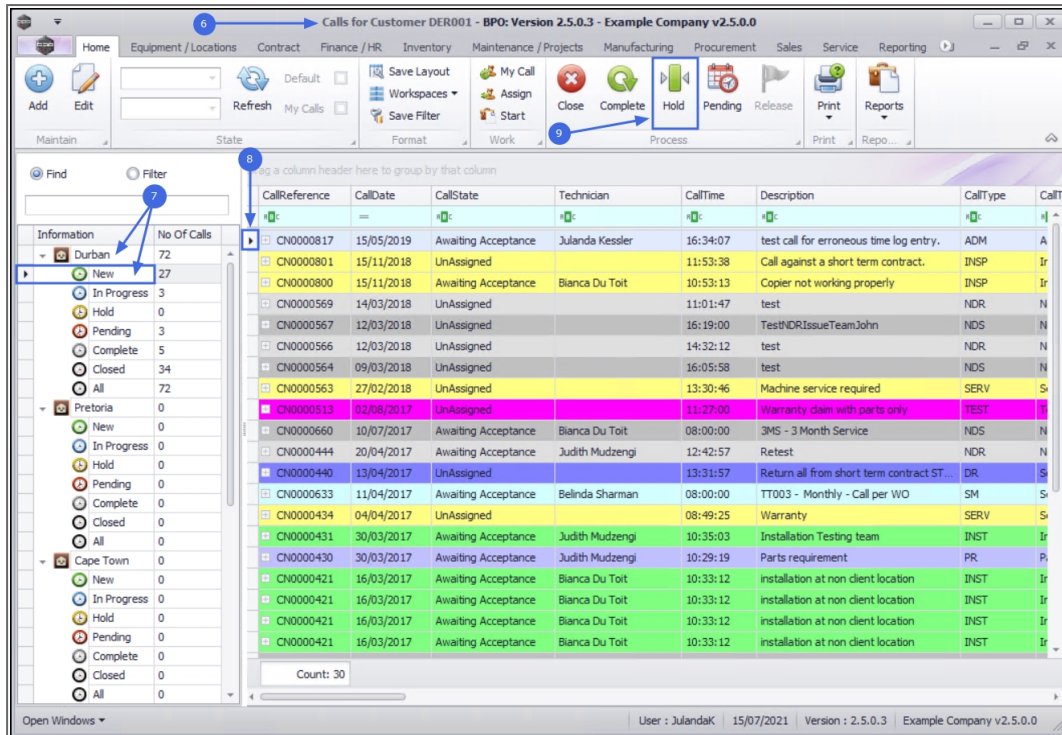
[For a detailed handling of this topic refer to Calls - Complete a Call](#)



## PLACE CALL ON HOLD

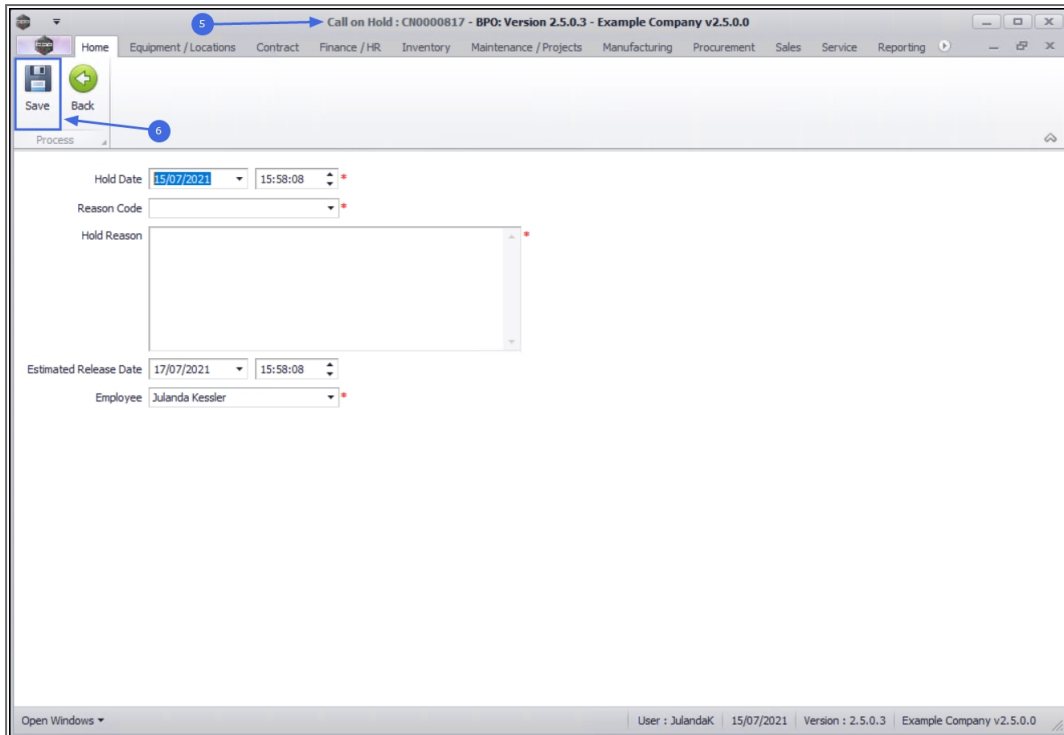
Placing a call on Hold will result in work being stopped to resolve a client/customer issue e.g there is no one available on site to allow a technician access to a location, or the client is awaiting approval from their finance department before a new part request can be fitted. The [SLA Monitor](#) will "pause" until the call is Released from Hold.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site**.
  - The example has **Durban** selected and the call status is **New**.
3. Click on the **row** of the Call you wish to place on hold.
4. Click on **Hold**.



5. The **Call on Hold** : [call ref number] screen will be displayed.
6. Complete the hold information for the call and click on **Save**.

For a detailed handling of this topic refer to [Calls - Place on Hold](#)

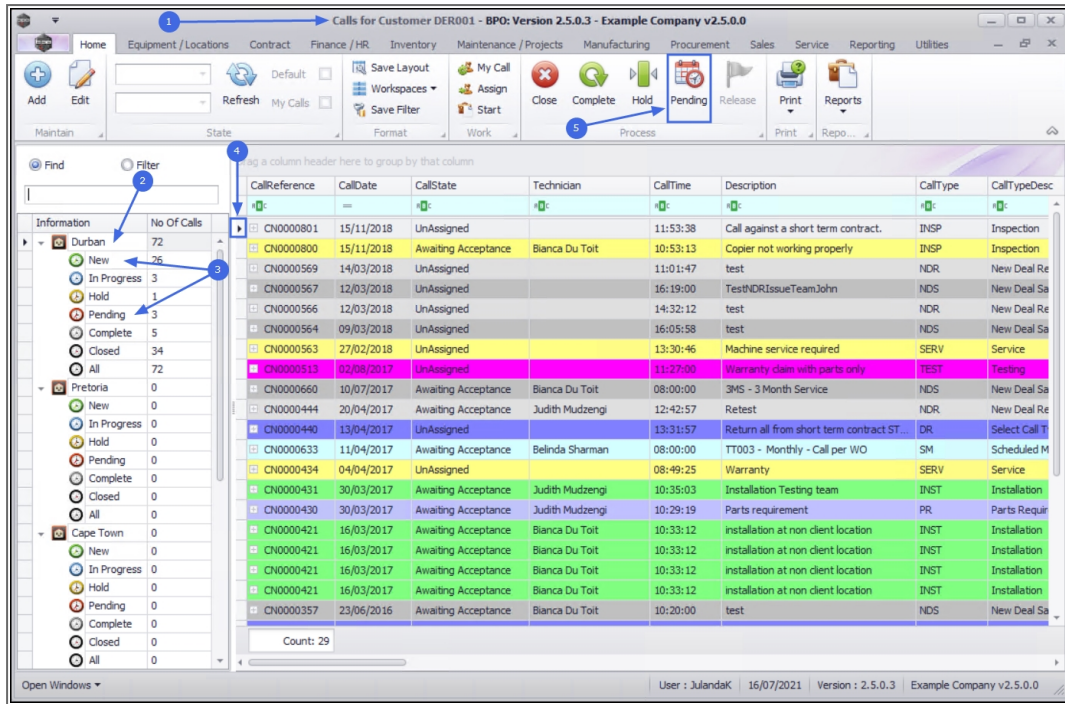


## MOVE TO PENDING

Placing a Call in a **Pending** status differs from placing a call on Hold. A call is placed in a pending status when work needs to be stopped to resolve a company issue, e.g. lack of stock to complete the work. The [SLA Monitor](#) will continue to run.

1. From the **Calls for Customer** [customer code] screen,
2. Select the **Site**.
  - The example has **Durban** selected.
3. The **Call Status** must be in either the **New** or **In Progress** status.
4. Click on the **row** of the Call you wish to place in pending.
5. Click on **Pending**



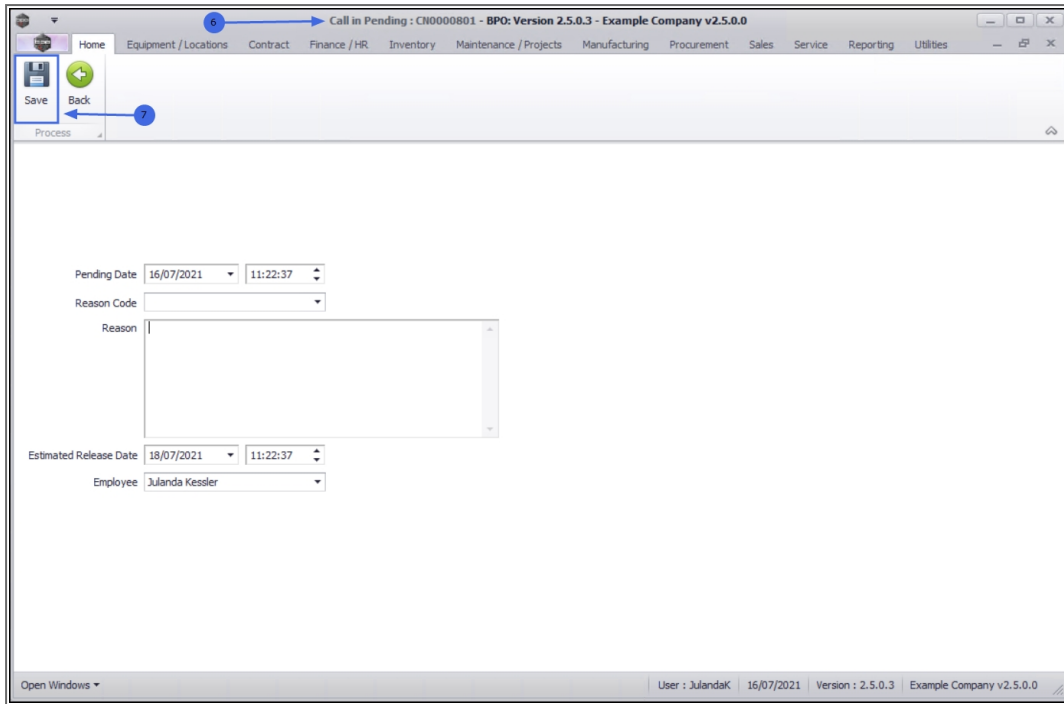


6. The **Call in Pending** : [call ref number] screen will be displayed.
7. Complete the pending information for the call and click on **Save**.



For a detailed handling of this topic refer to [Calls - Move to Pending Status](#)

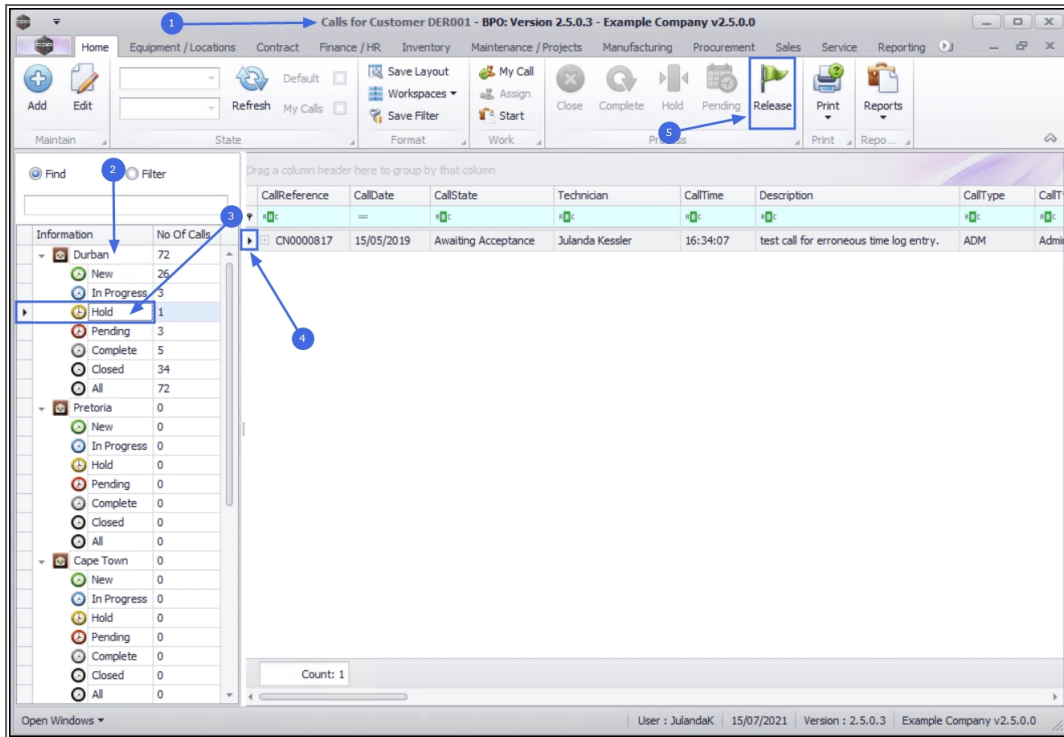




## RELEASE A CALL

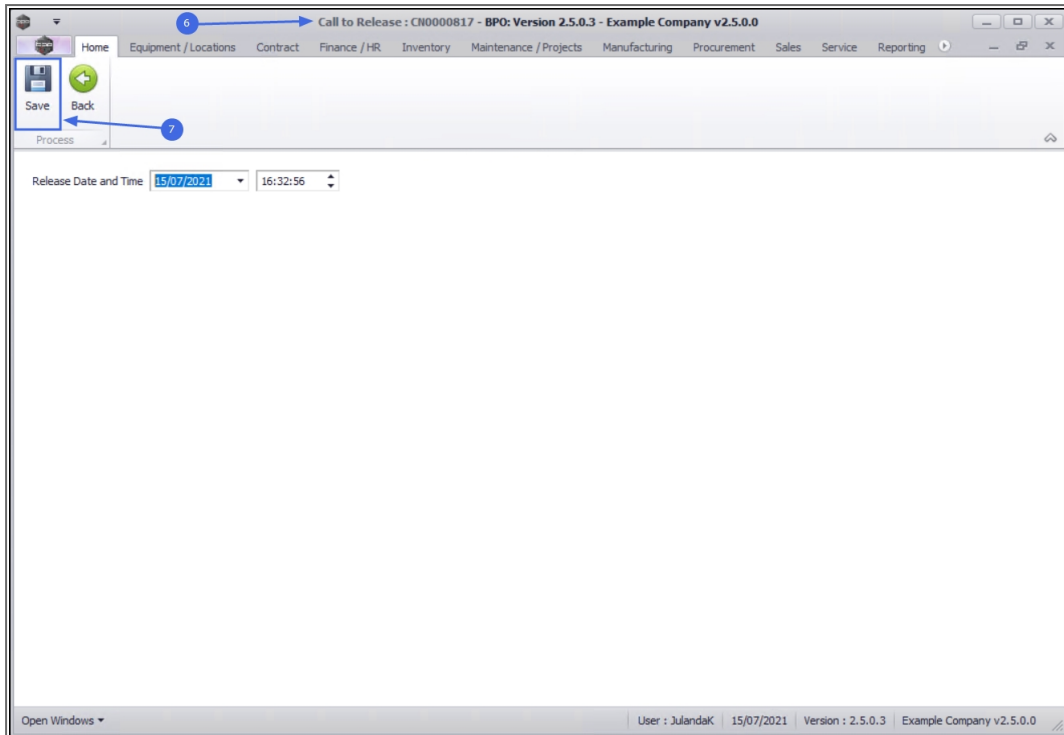
When a call is released, it will move back to the **New** status where it can be re-assigned. When the call is re-assigned, a new work order should be created.

1. From the **Calls for Customer [customer code]** screen,
2. Select the **Site**.
  - The example has **Durban** selected.
3. Ensure that the **Call Status** has been set to **Hold**.
4. Click on the **row** of the Call you wish to release from hold.
5. Click on **Release**.



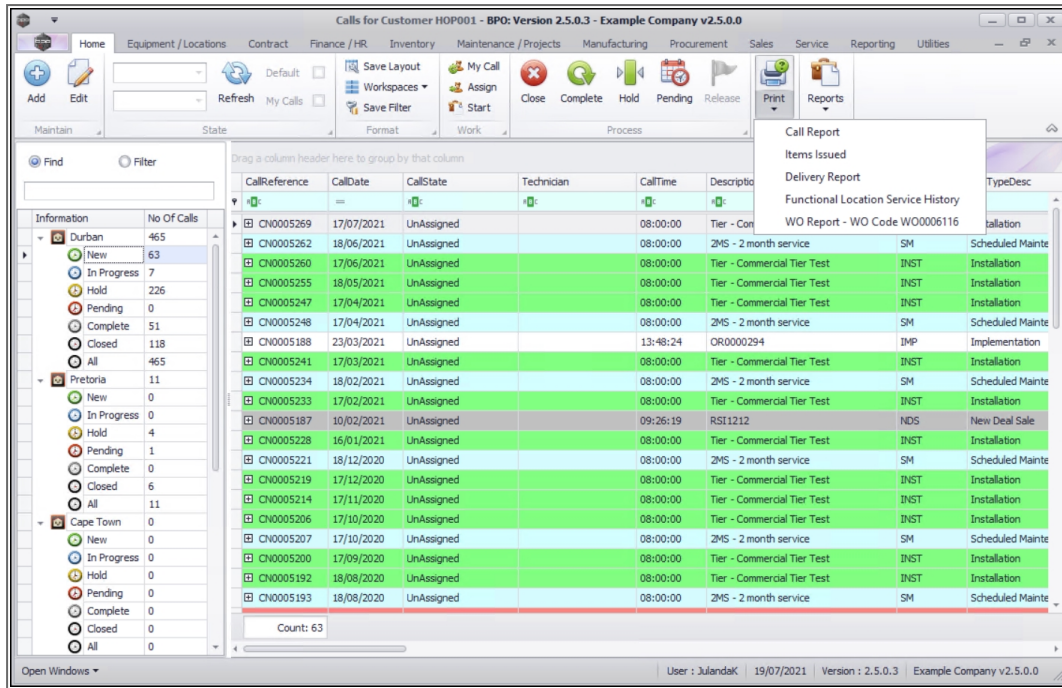
6. The **Call to Release** : [call ref number] screen will be displayed.
7. Complete the release information for the call and click on **Save**.

For a detailed handling of this topic refer to [Calls - Release a Call](#)



## PRINT PANEL

You can [Print Call Report](#), [Items Issued History Report](#), [Delivery Report](#), Functional Location [Service History Report](#), or a [Work Order Report](#) for the **Call** from the **Calls for the Customer** screen, by selecting the **Print** button.



## REPORTS PANEL

The **Reports** button allow you to print Reports regarding the Service Centre for:

1. **Calls**,
2. **Housekeeping**,
3. **Performance** and
4. **Troubleshooting** on Calls linked to the selected Customer.

**Calls for Customer TIAD01 - BPO: Version 2.4.0.11 - Example Company**

CallReference	CallDate	CallState	Technician	CallTime	Description
CH0000828	31/01/2020	Unassigned		13:05:54	Test call for new swap out funcio...
CH0000638	20/04/2017	Awaiting Ac...	Belinda Sha...	08:00:00	TT018 - Bi-annually, Mono 1000 -
CH0000603	23/02/2017	Awaiting Ac...	Bianca Du T...	08:00:00	TT072 - 2 Monthly - Call per WO
CH0000604	23/02/2017	Awaiting Ac...	Bianca Du T...	08:00:00	TT072 - 2 Monthly - Call per WO
CH0000361	23/06/2016	Rejected by	Belinda Sha...	13:31:37	test
CH0000109	26/02/2015	Awaiting Ac...	Carolina Su...	09:52:00	Test machine
CH0000084	11/11/2014	Awaiting Ac...	George Jam...	16:17:59	Magenta toner required
CH0000061	19/08/2014	Awaiting Ac...	Wesley Hay...	10:36:08	Toner to be delivered
CH0000059	08/08/2014	Awaiting Ac...	Wesley Hay...	12:27:58	Full set of toners required
CH0000055	07/08/2014	Awaiting Ac...	Belinda Sha...	12:14:38	Toner required
CH0000047	31/07/2014	Awaiting Ac...	George Jam...	14:13:49	Service required

Count: 11

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