

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

SERVICE

MY WORK – VIEW CUSTOMER

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

If one of these work orders is linked to a **customer** - you will be able to view the customer details from the **My Work** listing screen.

Ribbon Access: Service > My Work



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to **view** the related **customer details** of.
- Click on **View Customer**.

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

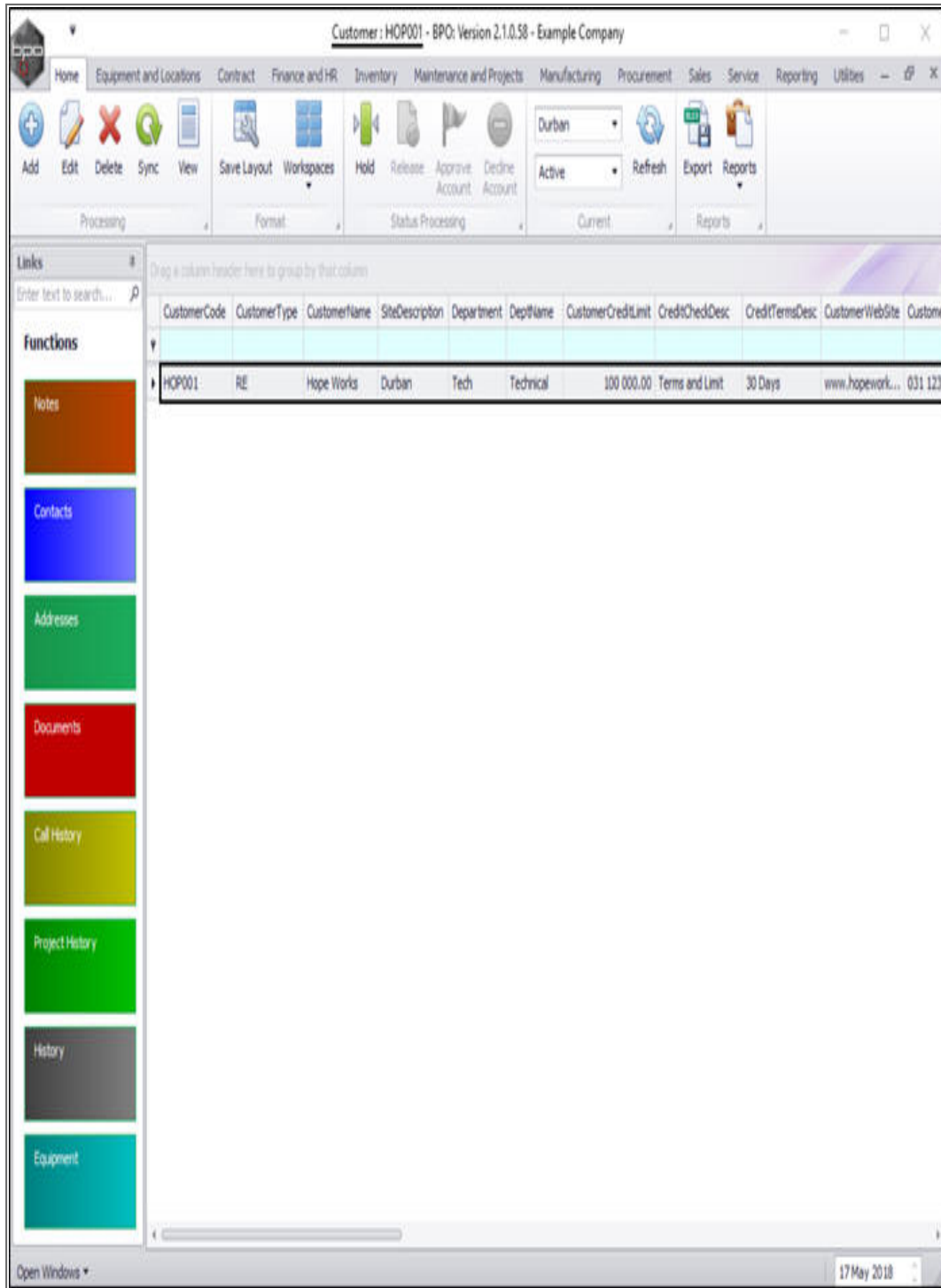
Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DepName	Sc
WO0001992	RSI V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HCP001	Hope Works	Technical	15
WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	CH0000566	Toner required ...	CALL	HCP001	Hope Works	Technical	22
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing							26
WO0001662	Machine service required	Durban	O	SERV								15
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15

Open Windows | 17 May 2018

- The **Customer** screen will open with the relevant customer selected.
 - **Note:** This is only applicable if the work order is linked to a customer.



- You can also **View Customer Details** by navigating from the My Work screen to the Maintain WO screen and then clicking on the

Customer Info tab.

Maintain WO - Ref WO0001664 - 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 Toner check and clean required

Requestor Abigail Mine

WO Type Repair

Priority 2

Request Date 18 May 2018 09:42:59

Status Open

Billable

Capitalise

Work Order Item

Functional Location **Equipment**

Item 2020-103053

Comment Check Colour Toner - not printing effectively

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CH0000566
PMNG	Project Reference	

Schedule

Assigned To Abigail Mine

Assigned By Abigail Mine

Scheduled Start 22 May 2018 00:00:00

Scheduled End 22 May 2018 02:00:00

Actual Start 17 Jun 2018 00:00:00

Actual End 17 Jun 2018 00:00:00

Delay Comments Currently on Schedule

Rectification Code

Rectification Comments

Completion Date 17 Jun 2018 00:00:00

Open Windows | 17 May 2018

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