

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

SERVICE

CALLS - LOG A CALL

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

Calls are primarily created when customers phone in for service related requirements.

Notes on Calls

- The **Call Listing** screen is used to log billable and non-billable **Service Calls** against contract and non-contract items, whether these are Assets or Locations.
- One or multiple [Work Orders](#) can exist within a call. Work Orders are likened to Job Cards or Work Instructions. [Work In Progress](#) transactions will be recorded against these work orders for the work that is required including Labour Time Booking, Parts, Expenses, Travel, Services and Sub Contract Work.
- Generally either an Asset or Location must be selected when logging the Call, and a Work Order is auto created when saving the Call. But this is dependant on your Company's system configuration. Refer to Specialized Call Configuration for more details about processing outside the standard processing.

¹BPO2 v2.5.1.3 or higher

- [New Deal Sale](#) and [New Deal Rental](#) processing will also process through the call centre screen to enforce the Work In Progress transactions for installation of Sale or Rental Items.
- Calls are [Assigned](#) to employees (such as Technicians or Drivers) in order to perform the work required. An employee must be set as a [Technician](#) in order to be available for assignment. Refer to TechConnect for more information related to our mobile application that Technicians can use out in the field.
- Once work has been completed Work In Progress transactions can then be [Invoiced](#) if required, dependant on the scenario.



If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can quickly update the details via the relevant **Ellipse** button in the call screen. Refer to [Calls - Edit Buttons](#)



You cannot log a call for a Customer on Hold. If you select a customer that is on hold, you will be asked if you would like to log a [Call Request](#) instead.



An optional telephone number can be added to the call, which will be for your reference, when logging or editing the call. Refer to "[Call Details](#)" on [page 4](#)

CALL LOGGING – DETAIL SELECTION METHODS

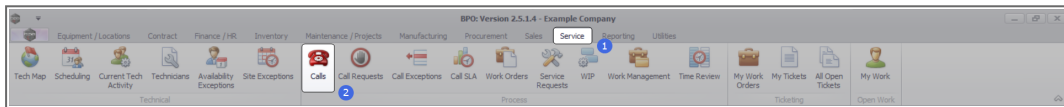
- Call details can be selected based on what information is given when the client phones in.
- For example, if a call is logged for a serialised item and the serial number is known, this can be selected first. Associated header information will auto populate, which makes the call logging

process faster.

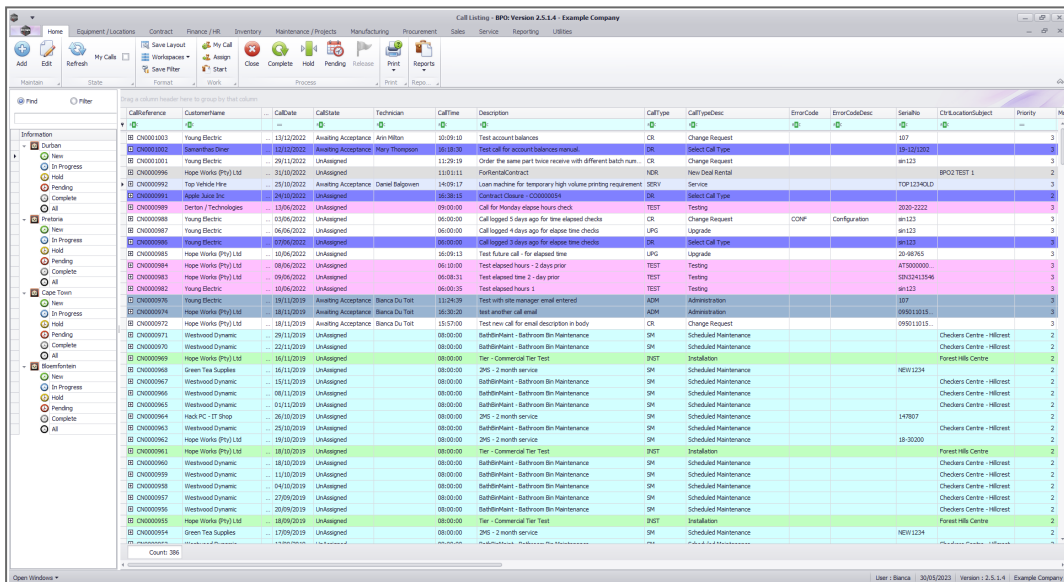
- In this manual, we will first look at the standard call logging process, and then include a few tips for [other call detail selection methods](#), such as first selecting the Serial Number or Location, Customer, Contact, or Telephone Number.

LOG A CALL

Ribbon Select Service > Calls



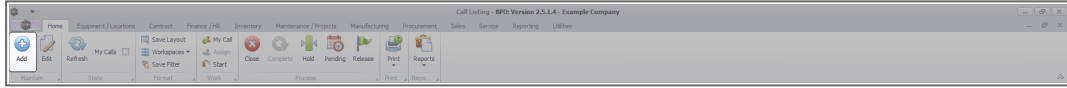
- The **Call Listing** screen will be displayed.



- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
CHN001003	Young Electric	13/02/2023	09:09:10	Test account balance	CR	Change Request			107		3
CHN001002	Silverwood Drive	12/02/2023	06:38:30	Test call for account balance manual	CR	Select Call Type			02-12/202		3
CHN001001	Young Electric	20/12/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
CHN000996	Hope Works (Pty) Ltd	24/08/2022	18:11:11	Printout/label	OCR	New-Deal Rental				BPO2 TEST 1	3
CHN000992	Top Vehicle Hire	20/02/2022	14:59:17	Loan machine for temporary high volume printing requirement	OSV	Service				TOP1234567	3
CHN000991	Acme Jute Inc	24/02/2022	05:38:15	Contact Closure - C0000054	CR	Select Call Type					3
CHN000989	Deton / Technologies	13/04/2022	09:00:00	Call for Monday escape hours check	TEST	Testing			2020-2222		3
CHN000988	Young Electric	10/06/2022	05:00:00	Call logged 5 days ago for escape time checks	CR	Change Request	CONF	Configuration	an123		3
CHN000987	Young Electric	06/04/2022	05:00:00	Call logged 4 days ago for escape time checks	CR	Change Request			an123		3
CHN000986	Young Electric	07/04/2022	05:00:00	Call logged 5 days ago for escape time checks	CR	Select Call Type			an123		3
CHN000985	Hope Works (Pty) Ltd	10/04/2022	05:00:13	Test future call - for elapsed time	LPG	Upgrade			20-46760		3
CHN000984	Hope Works (Pty) Ltd	06/04/2022	05:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
CHN000983	Hope Works (Pty) Ltd	06/04/2022	05:00:31	Test elapsed time 2 - day prior	TEST	Testing			52021412946		3
CHN000982	Young Electric	18/04/2022	05:00:30	Test elapsed hours 1	TEST	Testing			an123		3
CHN000976	Young Electric	08/11/2019	13:24:26	Test with the wrong email entered	ADM	Administration			107		3
CHN000974	Hope Works (Pty) Ltd	18/11/2019	05:30:20	Test another call email	ADM	Administration			059312931		3
CHN000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			059013015		3
CHN000971	Westwood Dynamic	20/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000970	Westwood Dynamic	22/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000969	Hope Works (Pty) Ltd	06/11/2019	08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CHN000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
CHN000967	Westwood Dynamic	15/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000966	Westwood Dynamic	08/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000965	Westwood Dynamic	02/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000964	HOCH PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
CHN000963	Westwood Dynamic	21/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
CHN000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CHN000960	Westwood Dynamic	18/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000959	Westwood Dynamic	11/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000958	Westwood Dynamic	04/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000957	Westwood Dynamic	27/09/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000956	Westwood Dynamic	20/09/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
CHN000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
CHN000954	Green Tea Supplies	17/08/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Add** button.



- The **Call maintenance** screen will be displayed.

Customer: Young Electric

Contact No: [Empty]

Address: [Empty]

Call Type: [Empty]

Error Code: [Empty]

Description: [Empty]

Call Date Time: 31/05/2023 13:12:32

Priority: 3

SLA: [Empty]

Date Required: 31/05/2023

Order No: [Empty]

Logged By: Bianca

Status: In-Queue

Optional Info: [Empty]

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Call Request Reference	
Contact No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls: [Empty]

CALL DETAILS

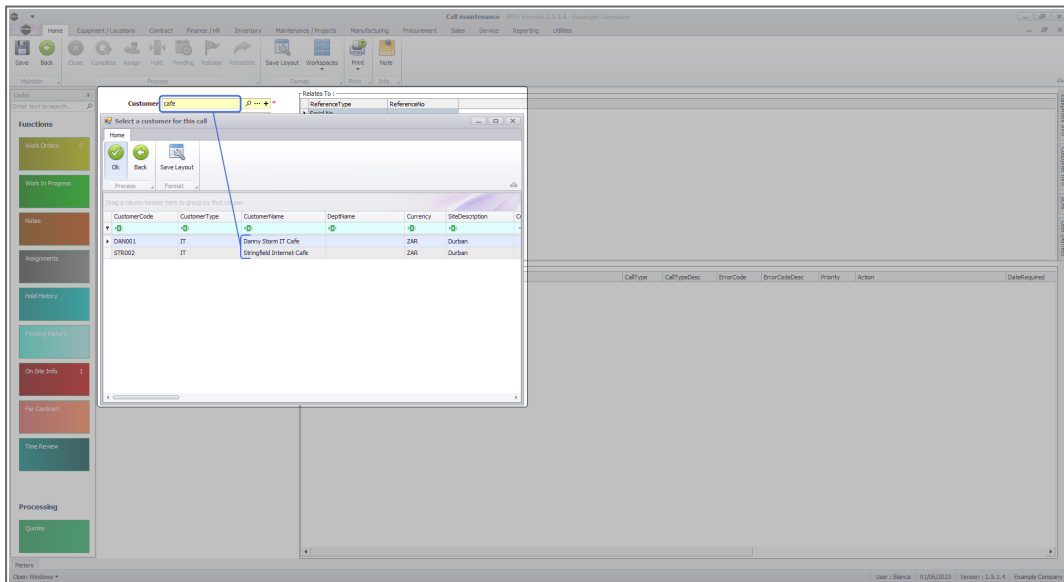
Customer: Search for and select the customer:

- The **yellow** colouring of the field indicates that you can search for the customer, using one of two methods.



Search Method 1:

- Type in a part of the Customer Name in the Customer field and press **Enter**.
- The example has "cafe" typed in the field. When pressing Enter, the system will locate all the Customers that has "cafe" as part of the name.
 - If the system locates the Customer, then the screen will be populated with the customer information.
 - If more than one Customer exists, then the **Select a customer for this call screen** will display a list of the Customer's that have "cafe" forming a part of the name.
 - Skip to [Select Customer](#) below





Search Method 2:

- Click on the **search** button in the customer field.
- The **Select a customer for this call** screen will display, listing all Active Customers.
- Click on the **row** of the **customer** you wish to **log a call** for.
- Click on **OK**.

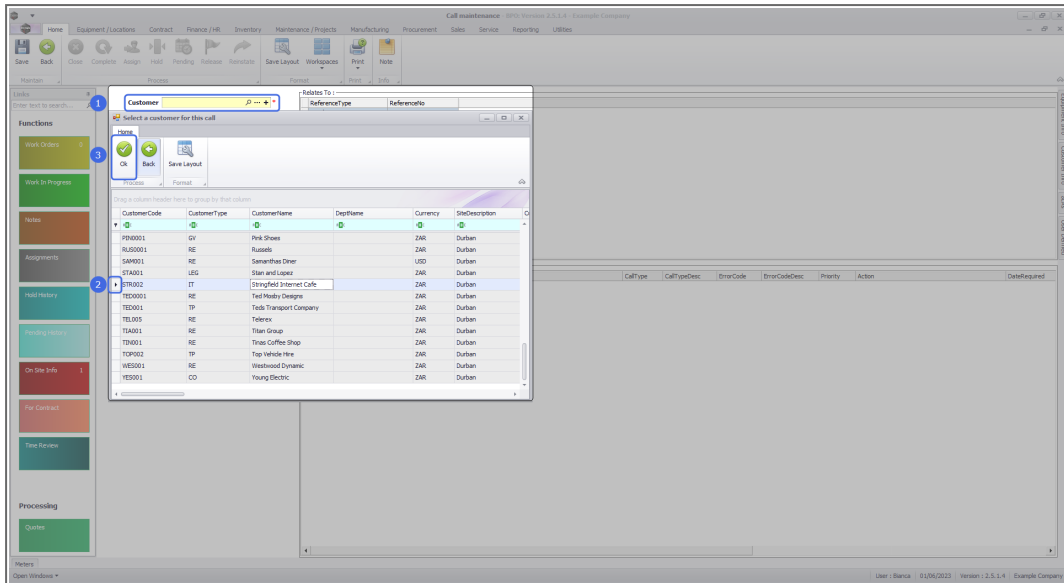
The screenshot shows the 'Call maintenance' window with a search dialog open. The dialog displays a table of active customers. The following table represents the data shown in the screenshot:

CustomerCode	CustomerType	CustomerName	Currency	SiteDescription	CustomerPho
HEL0001	RE	Hello World	ZAR	Durban	94890691
HIL000001	HILLCRESTP	Mary Contrary	ZAR	Durban	083 559
HOP001	RE	Hope Works (Pty) Ltd	ZAR	Durban	031 123
HOT0001	IT	Hot Pink	ZAR	Durban	093873
ITS0001	IT	IT Supplies	ZAR	Durban	031 123
JUS001	RE	Just In Time	ZAR	Durban	031 123

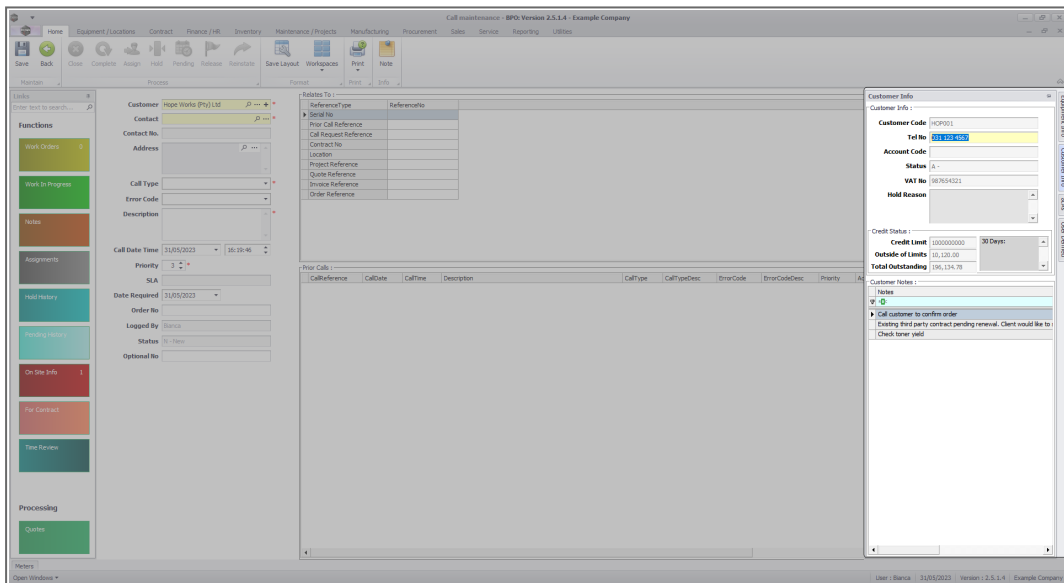


Select Customer:

- Click on the **row** of the **customer** you wish to **log a call** for.
- Click on **OK**.



- The **Customer Info** docking panel will **expand** to display view only details for the selected customer. This is helpful for customer and credit status checks, as well as any prior call notes.
- When done, click anywhere outside this dock panel to hide it.



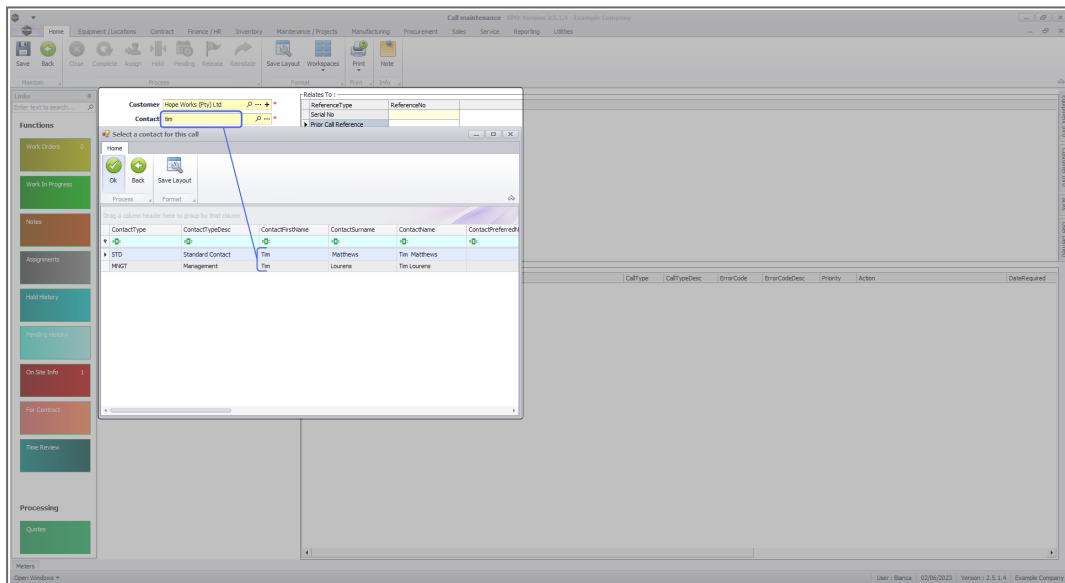
Contact: Search for and select the contact:

- The yellow colouring of the field indicates that you can search for the customer, using one of two methods.



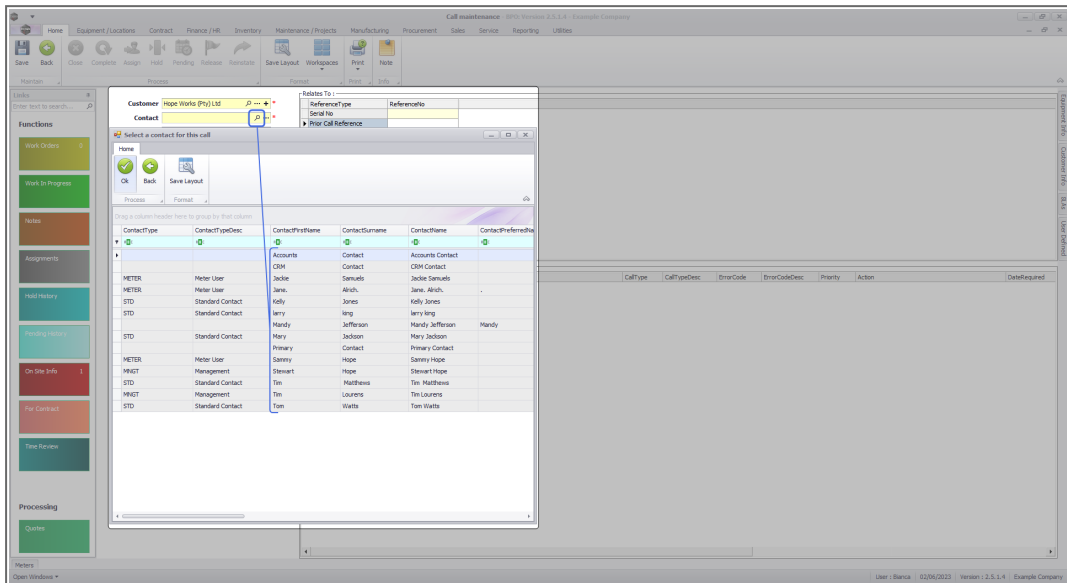
Search Method 1:

- Type in a part of the Contact Name in the Contact field and press Enter.
- The example has "Tim" typed in the field. When pressing Enter, the system will locate all the Contacts that has "Tim" as part of the name.
 - If the system locates the Contact, then the field will be populated with the contact name.
 - If more than one Contact exists, then the Select a contact for this call screen will display a list of the Contact's that have "Tim" forming a part of the name.
 - Skip to [Select Contact](#) below.



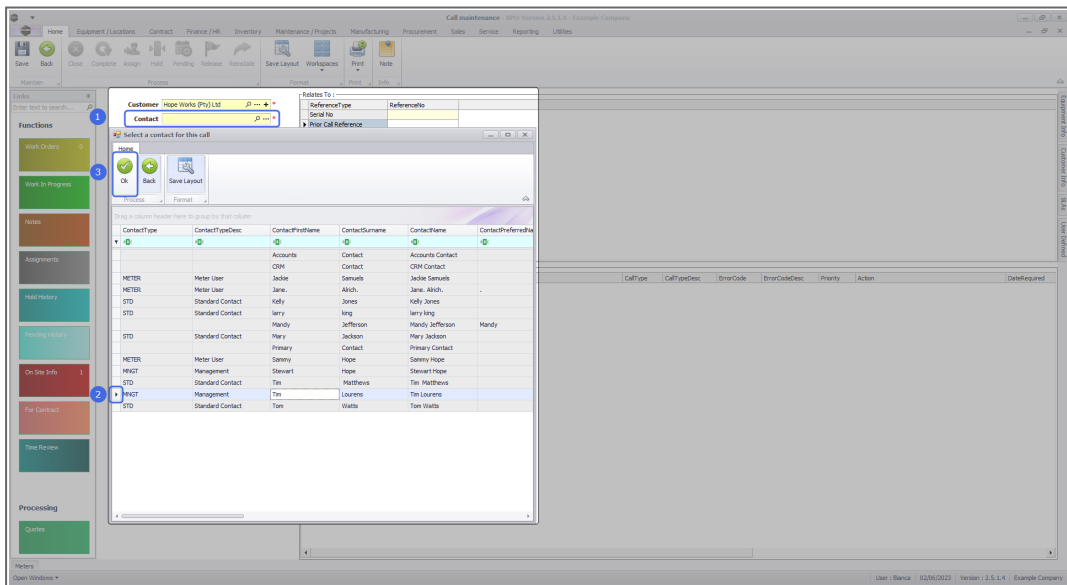
Search Method 2:

- Click on the search button in the contact field.
- The Select a contact for this call screen will display, listing all Active Contacts for the Customer previously selected.



Select Contact:

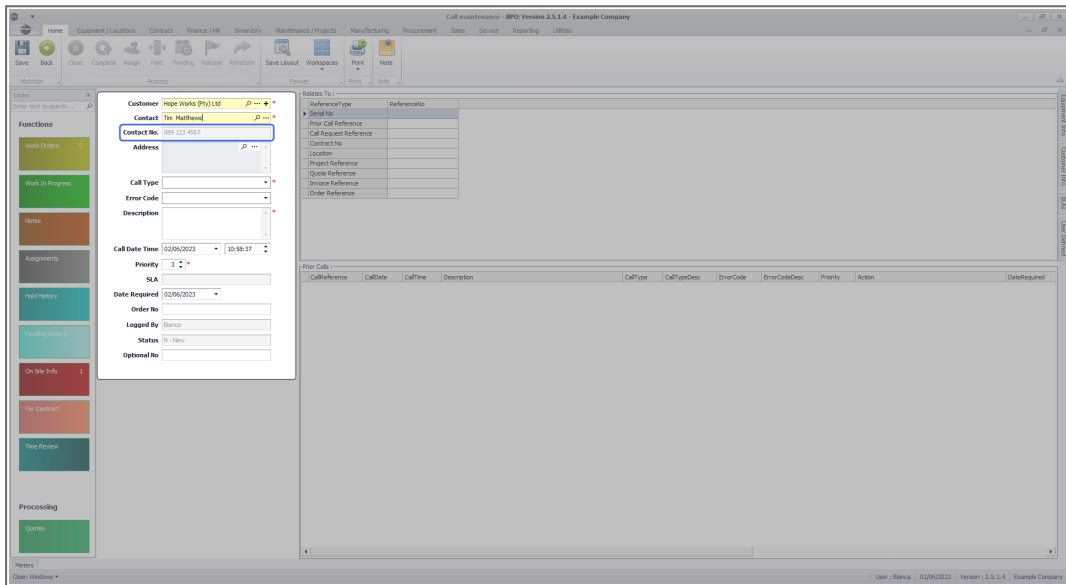
- Click on the row of the contact you wish to link to the call.
- Click on OK.



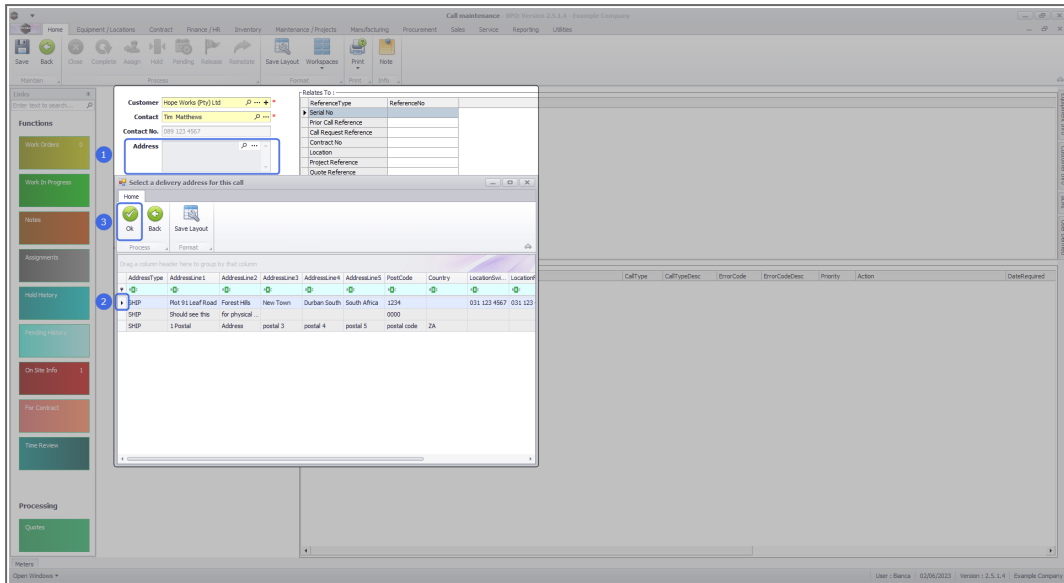


If you have searched for the contact person, and they do not appear on the list, then you can **add** a new contact from the **Call Maintenance** screen. This contact should be added as a **Standard Contact**. Refer to [Calls - Add New Contact](#).

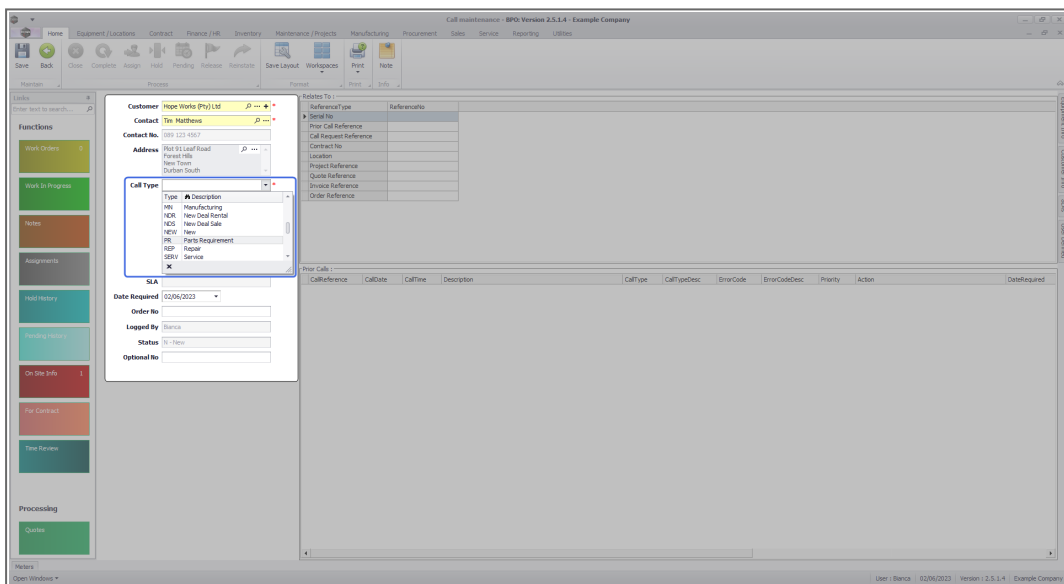
- **Contact No:** When the contact is selected, this field is auto populated with the contact's telephone number if configured on the contact.



- **Address:** Search for and select the address.

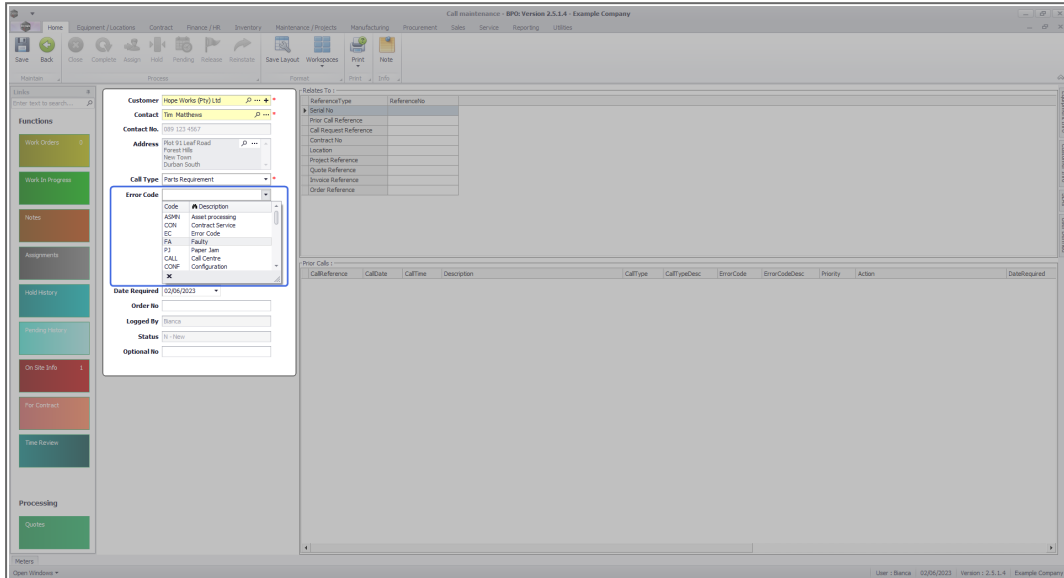


- **Call Type:** Select the required call type from the drop down list. (Refer to [Static Data - Call Types](#) if the call type required has not yet been configured.)



- **Error Code:** Click on the down arrow to display the error code list.

- Select the **error code type** as quoted by the customer. This field is not a mandatory field and may not be set up, depending on system requirements. (Refer to [Static Data - Call Error Codes](#) for setting up error codes if not configured.)



- **Description:** Click in the text box to type in a description for the work required.
- **Call Date Time:** This field will display the current date and time by default, and should not be changed.
- **Priority¹:** Click in the field to type in or use the arrow indicators to select the call priority.
- **SLA:²** This field cannot be updated, as the service level agreement information will populate for the customer.

¹1 = Most Important 5 = Least Important

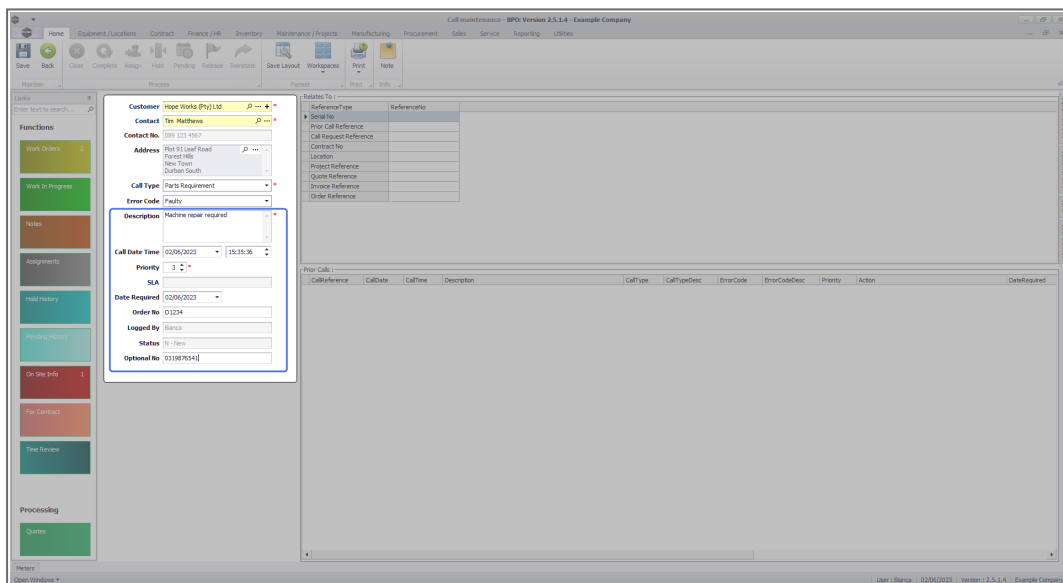
²This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).

- **Date Required:** The date will default to the current date. Click to type in or use the down **arrow** to select an alternative date using the calendar function.
- **Order No:** Type in the Purchase Order number raised by the customer, if required.



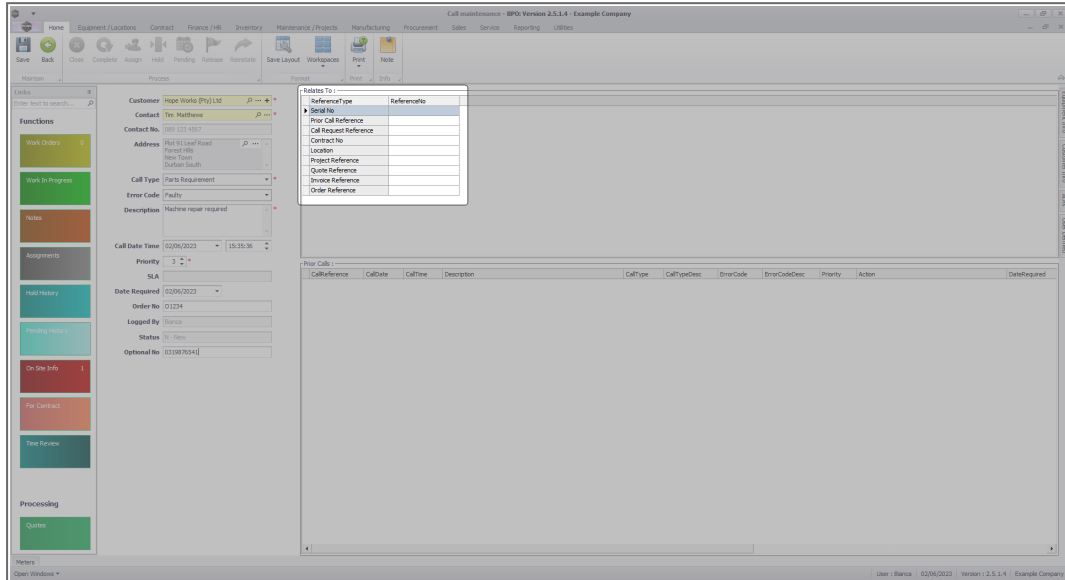
Note that this field could be mandatory based on the customer contract configuration i.e. if it is specified in the contract to include the Order Number then this will become a mandatory field for that particular customer.

- **Logged By:** This field will be populated with the name of the person currently logging the call.
- **Status:** The call status field will be set to **N - New** by default.
- **Optional No:** This field can be used for an additional reference number that the customer may wish to keep on record.



RELATED REFERENCES

The **Related To** frame holds related references, such as the Serial Number or Location, originating Call Request Number, Contract Number, etc.



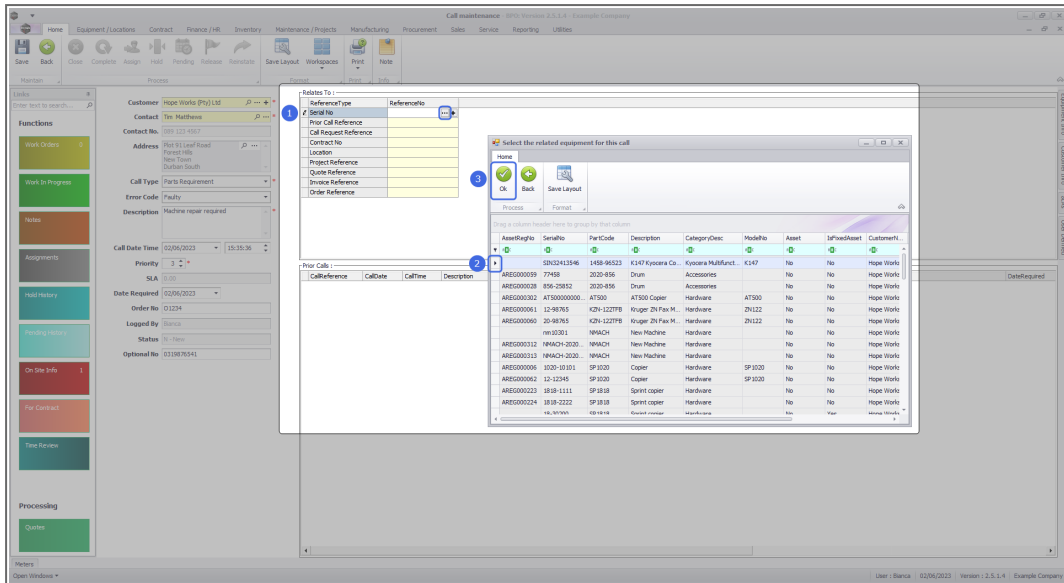
For Standard call log processing, we will select either a [Serial Number](#) or [Location](#).

Serial Number

- Click in the **Serial No.** field to display the **ellipsis** button.
- Click on the ellipsis button and select the serial number you wish to log the call against.
- Click on **OK**.

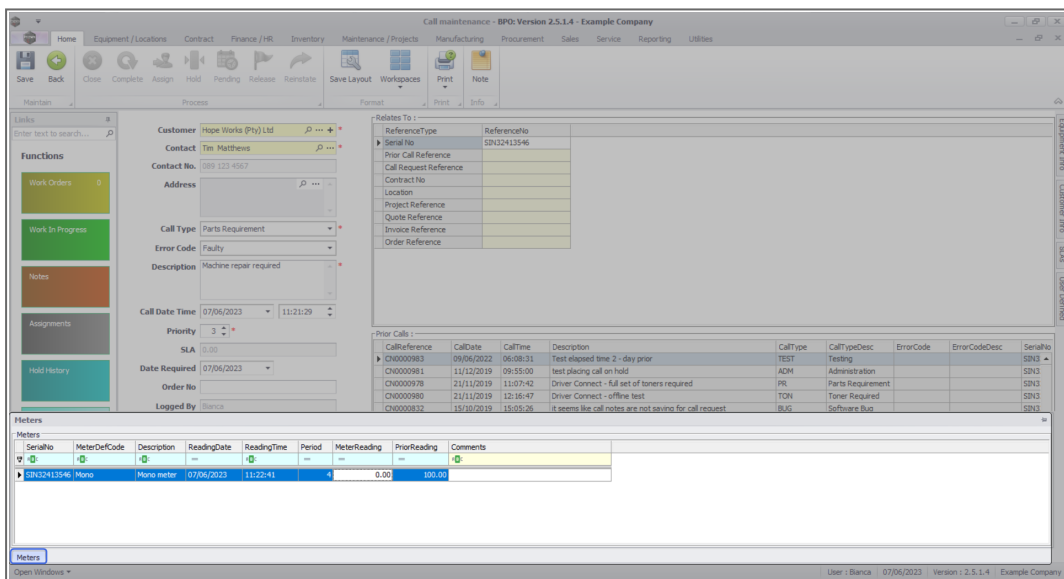


Note that as you have selected the customer first, the equipment list will be limited to the machines linked to the customer.



Meters

- If the asset has meters linked, then the Meters frame will automatically expand to display the Meter reading data grid.



- Type in the meter reading(s), if required.
 - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that

are yield controlled.

- If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.
- You can also add a comment for each meter reading.
- When the meter reading has been updated, **hide** the frame by clicking outside the frame.

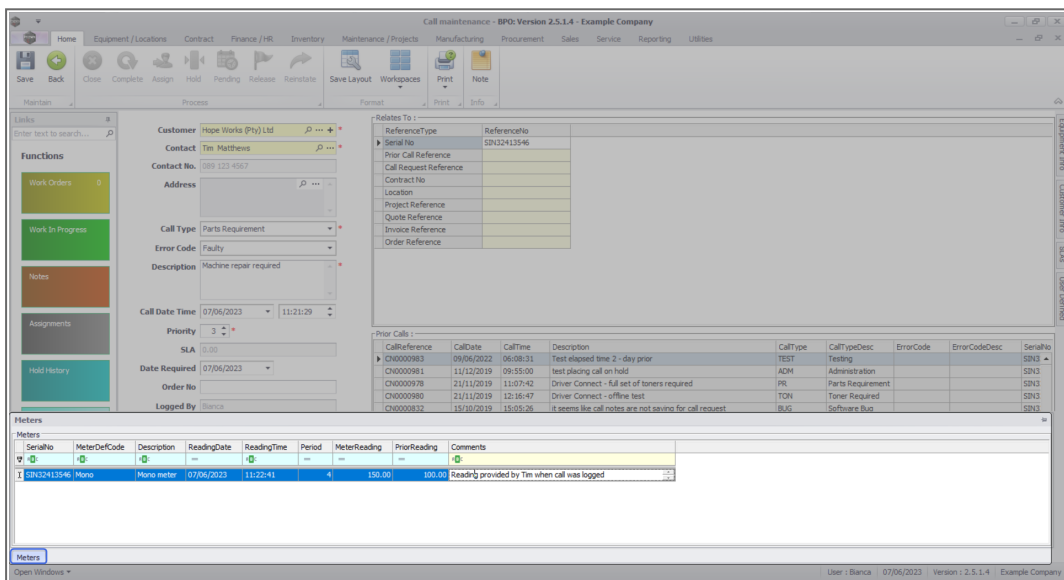
The screenshot shows the 'Call maintenance - BPO: Version 2.5.1.4 - Example Company' interface. The 'Meters' table at the bottom contains the following data:

SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReading	PriorReading	Comments
SN32413546	Mono	Mono meter	07/06/2023	11:22:41		150.00	100.00	Reading provided by Tim when call was logged

The screenshot shows the same software interface as above, but the 'Meters' table now shows an updated reading:

SerialNo	MeterDefCode	Description	ReadingDate	ReadingTime	Period	MeterReading	PriorReading	Comments
SN32413546	Mono	Mono meter	07/06/2023	11:22:41		0.00	100.00	

- Type in the meter reading(s), if required.
 - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that are yield controlled.
 - If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.
- You can also add a comment for each meter reading.
- When the meter reading has been updated, **hide** the frame by clicking outside the frame.



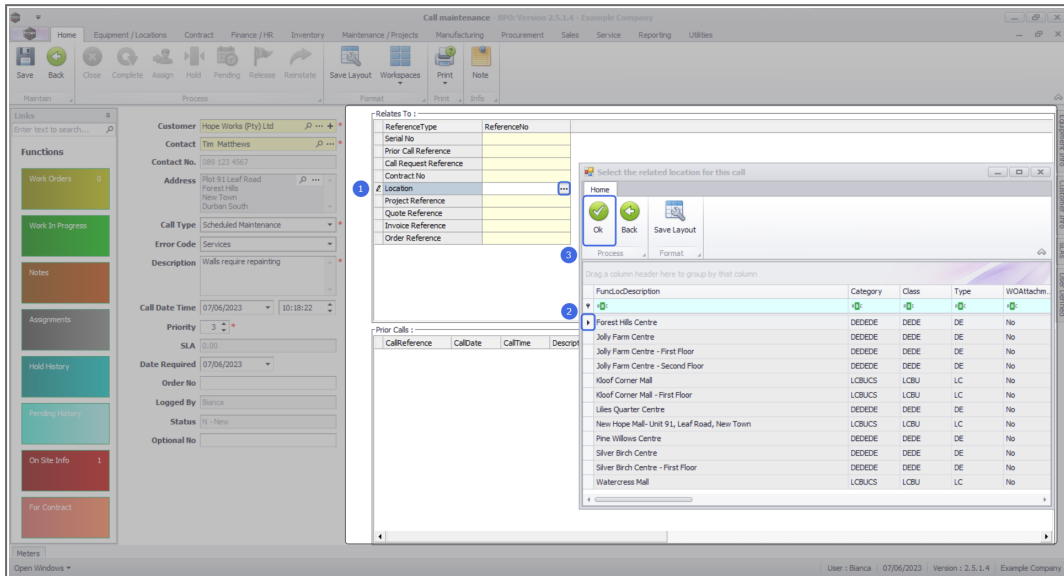
- Jump ahead to [Contract Number](#).

Location

- Click in the **Location** field to display the **ellipsis** button.
- Click on the ellipsis button and select the Location you wish to log the call against.
- Click on **OK**.

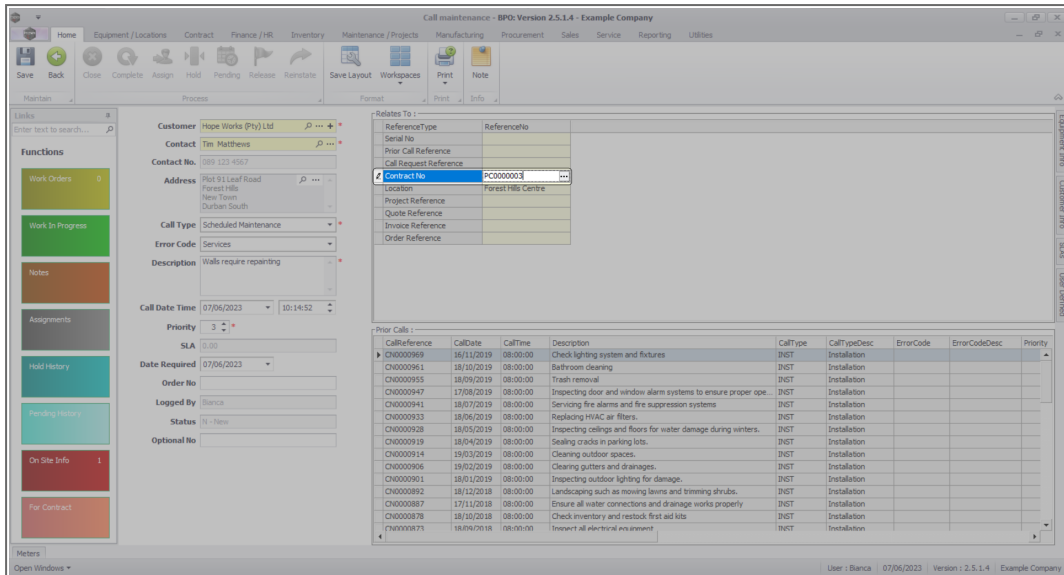


Note that as you have selected the customer first, the location list will be limited to the locations linked to the customer.



Contract Number

- If the Serial Number or Location you have selected is on contract, then the contract number field will auto populate with the contract number.



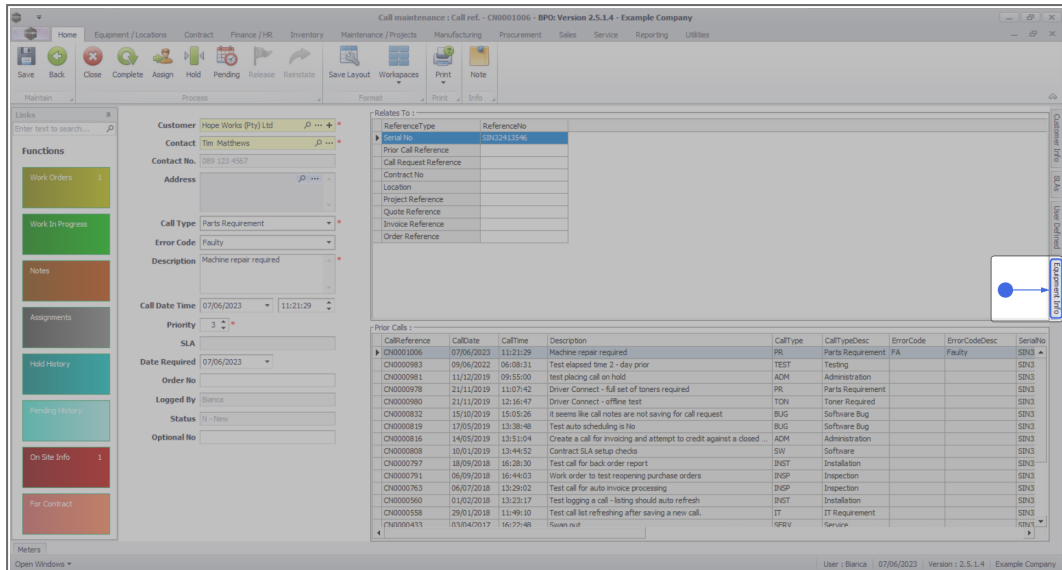
The Call maintain screen has a lot of helpful information that can be viewed when logging the call or after the call has been saved.

You can skip ahead to [Adding the Call Note](#) or [Saving the Call](#).

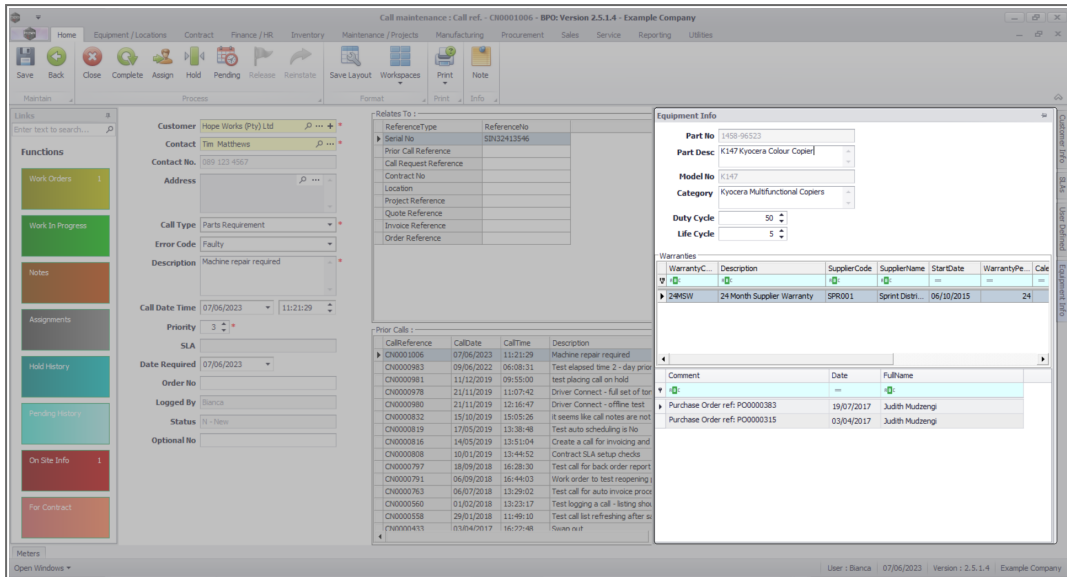
EQUIPMENT INFO

The Equipment Information dock panel will only contain information where a **Serial Number** is linked to the call, as this information is related to the associated part number.

- Click on the Equipment Info tab.



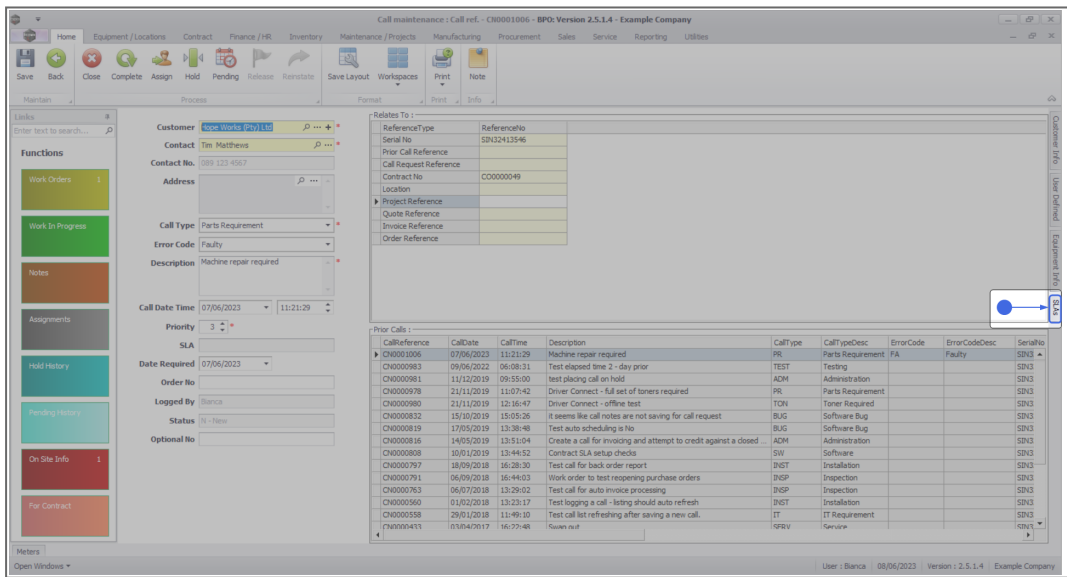
- The Equipment Info dock panel will open, displaying useful information related to the **serial number** and its **part number**:
 - Part No, Part Description, Model Number, Category, Duty Cycle and Life Cycle information related to the Part Number.
 - Warranties - will list any warranties assigned to the Serial Number.
 - Purchase Orders - ?



SLAs

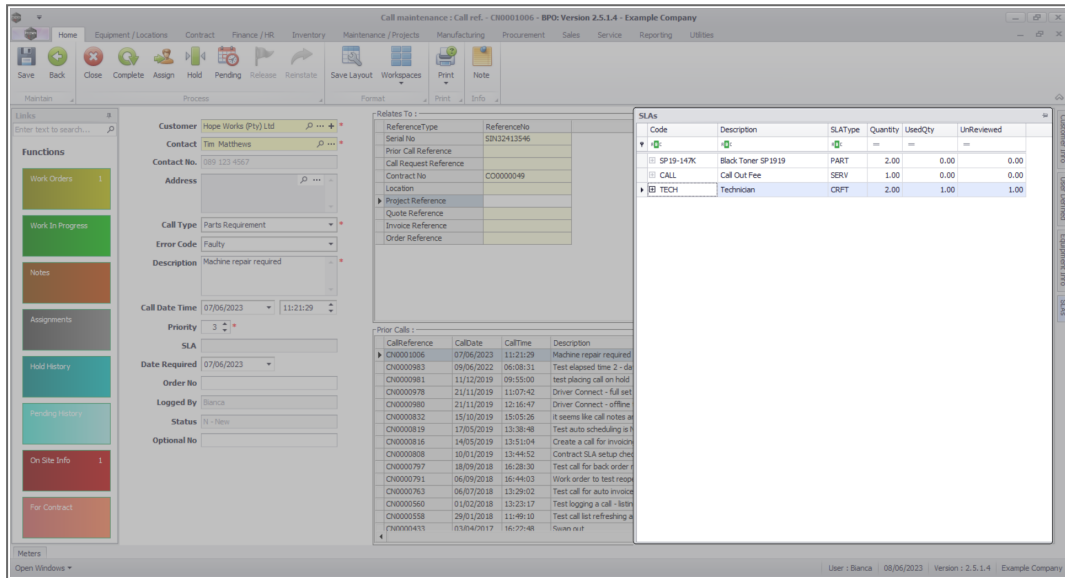
If the Item is on contract any SLA Contract Inclusion Items will display in this list.

- Click on the SLAs tab.

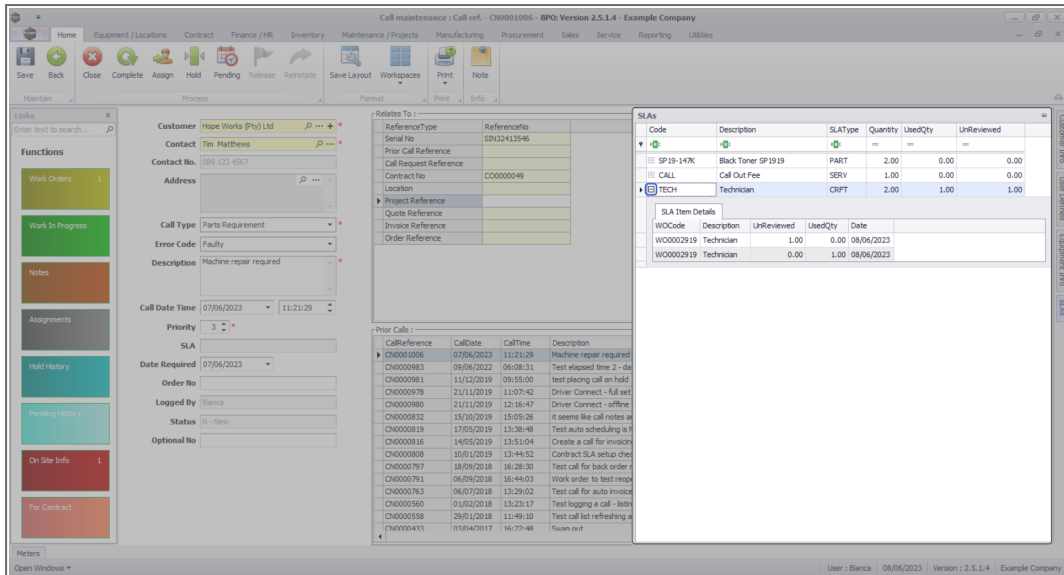


- The SLAs dock panel will open displaying the SLA Items as well as the quantity included.

For Labour Time, you will be able to see how many hours are included versus how many hours have been used. If Time Review is used, you can also see time logged that has not yet been reviewed as under SLA.



- Click on the expand data grid button to view the SLA Item Details
- This will show you a record of the items logged under SLA



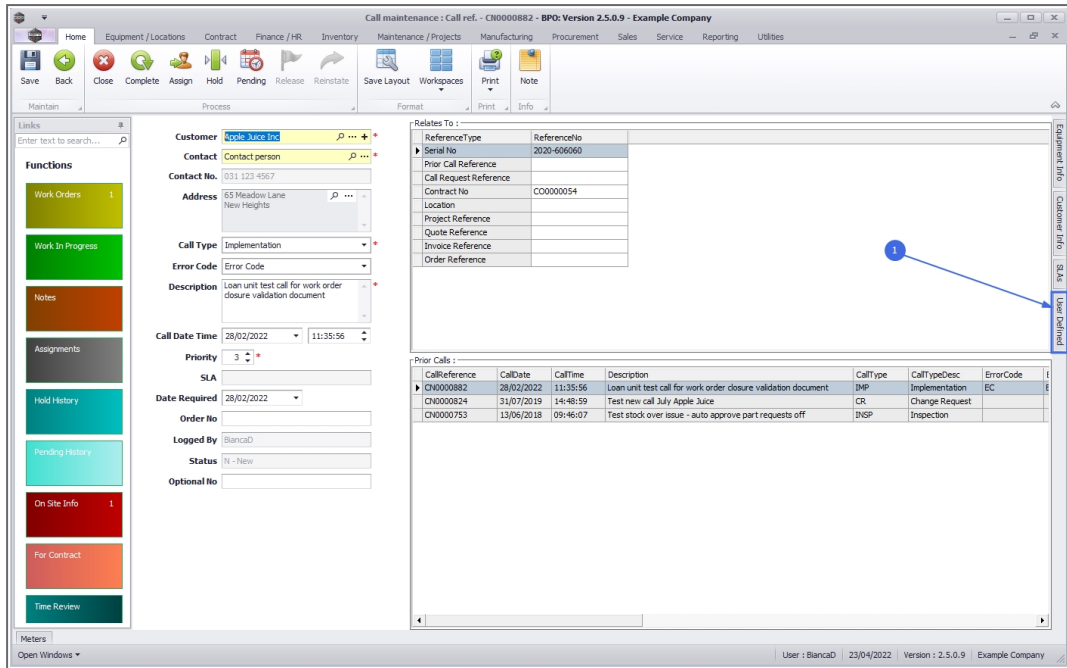
User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

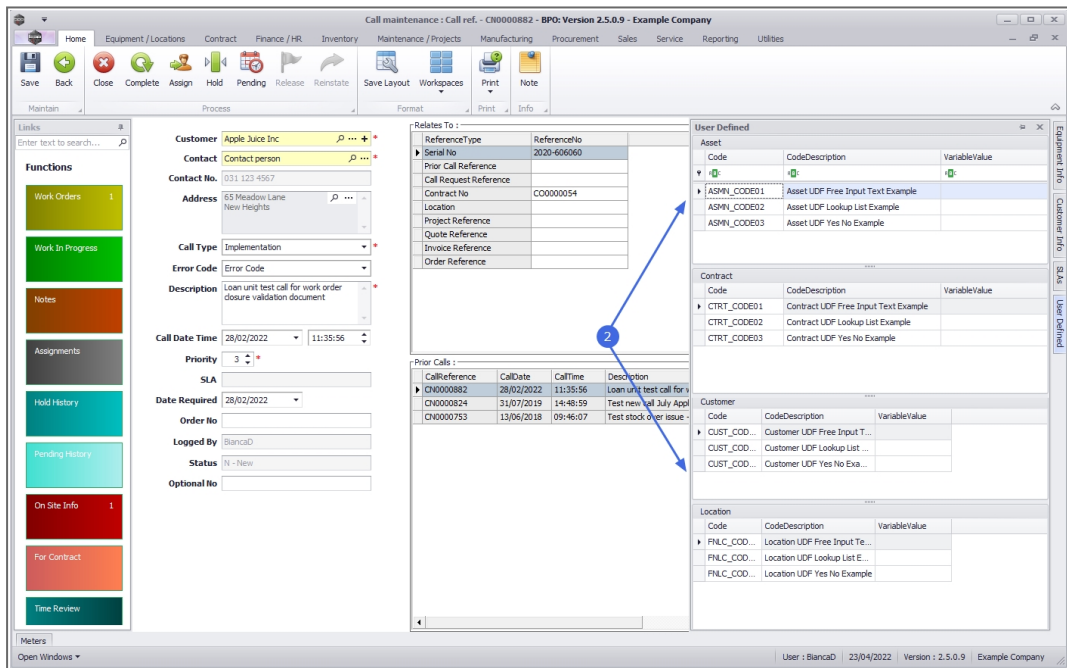
Version Compatibility¹

- Click on the **User Defined** dock panel tab to open the panel.

¹ BPO2 v2.5.0.8 or higher. " **Add Interest Rate** " on page 3

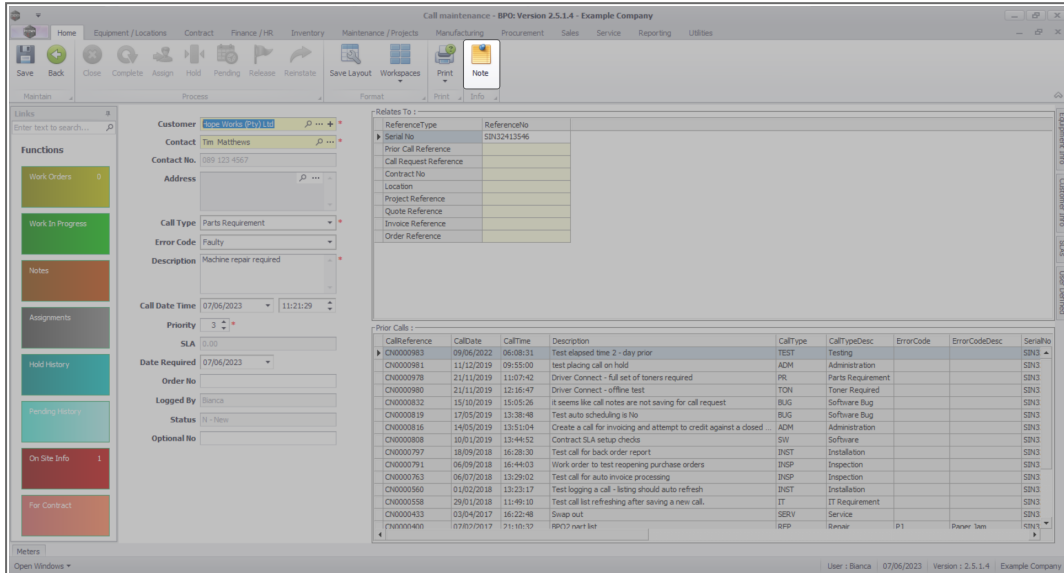


- Any custom fields configured and updated for the related **Customer**, **Asset** or **Location** and /or Contract linked to this call will display in the User Defined field panel.

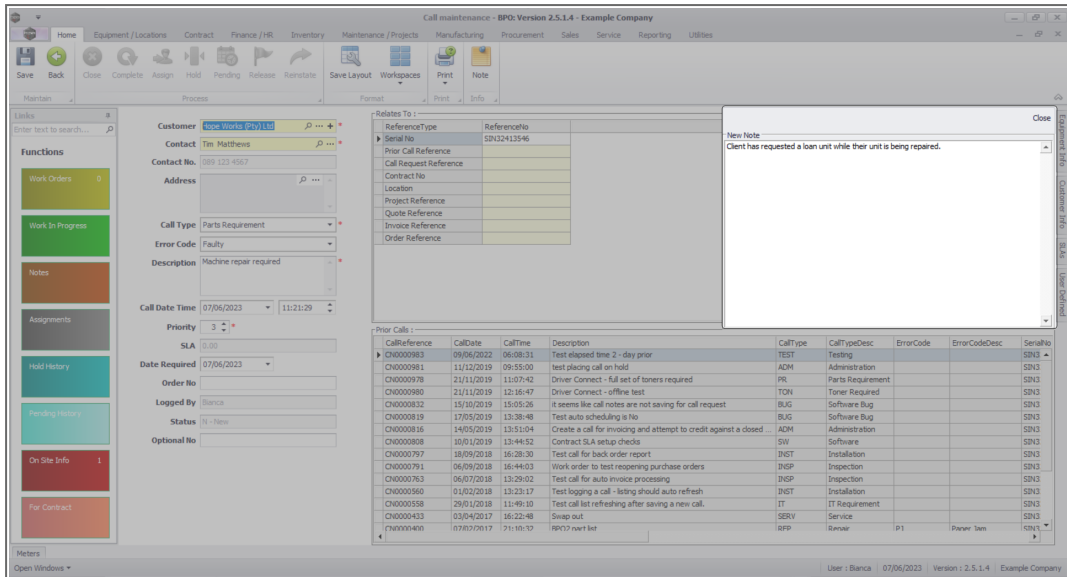


Add Call Note

- A Call Note can be added directly from the Call Maintain screen by clicking on **Note**.



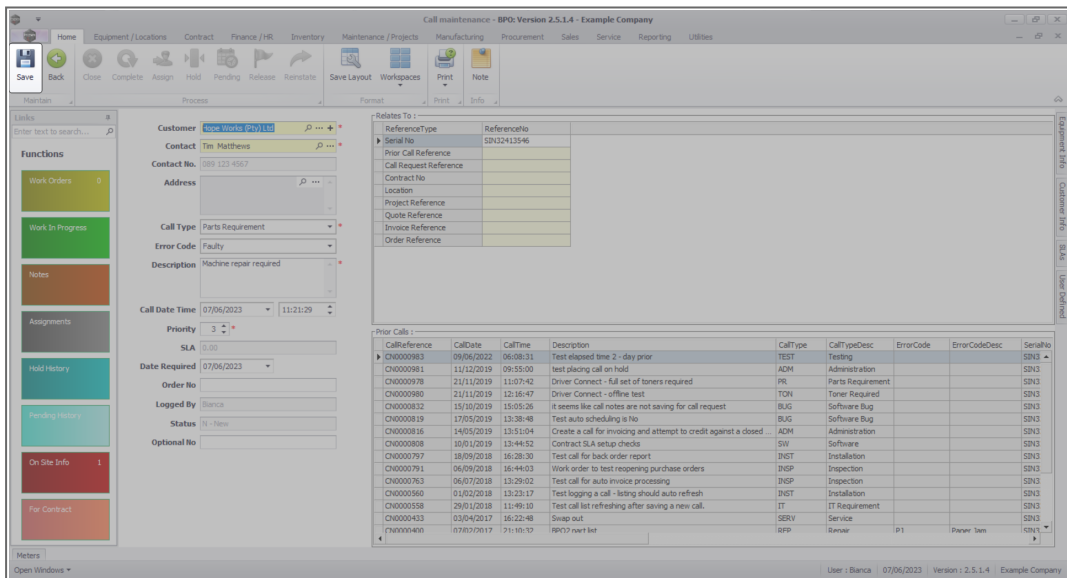
- The **New Note** frame will be displayed.
- Click in the text area to type the customer note and click on **Close** when done.
- The Note will be saved as a Call Note when the call is saved.



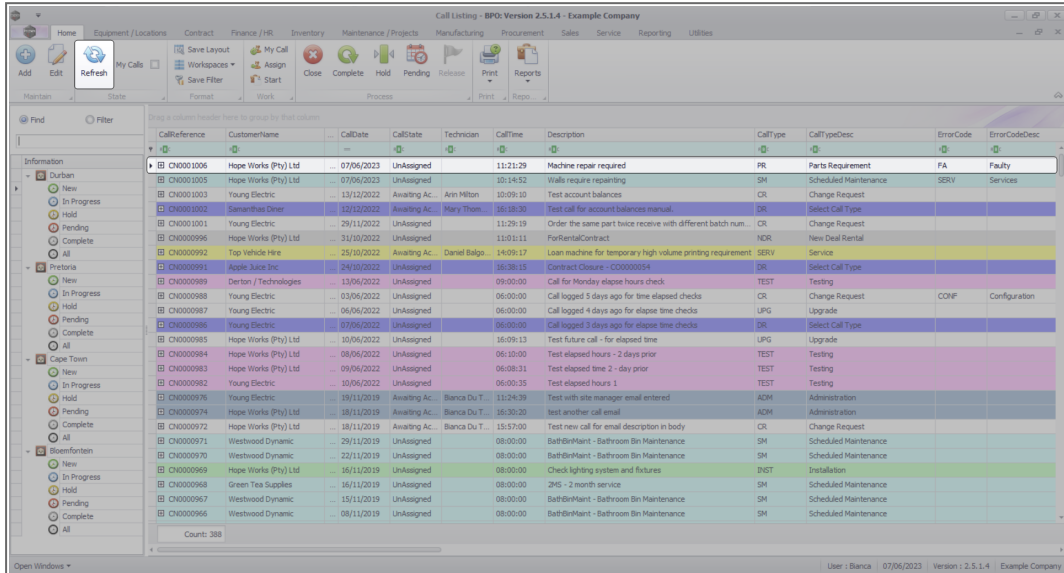
- Refer to **Calls - Notes** to view a list of all the notes created for the Call.

SAVE THE CALL

- When you are done, click on **Save**.



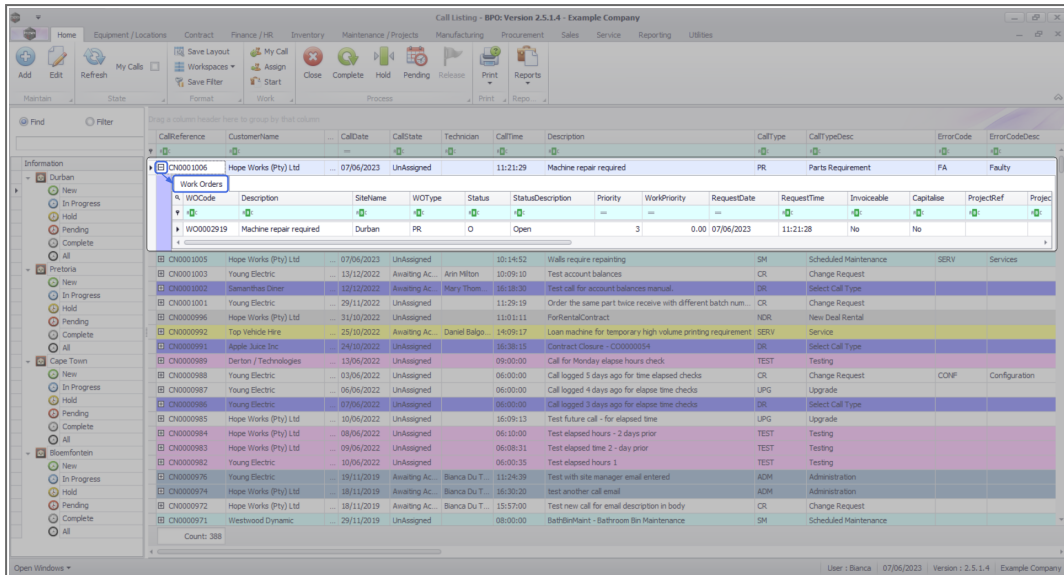
- You will return to the **Call Listing** screen where you can **view** the new **call log**.
- If the new call log is not immediately apparent in the Call Listing screen, then click on **Refresh**.



VIEW WORK ORDER DETAILS

For standard call centre processing, the underlying Work Order is automatically created.

- From the **Call Listing** screen,
- Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
- The **Work Order data grid** will expand to display the generated **work order number** and all the information related to the call log.



You can also view the [call work order\(s\)](#) from the call maintain screen.

ADDITIONAL DETAIL SELECTION METHODS

As noted in the introduction text, using these detail selection methods can help speed up the call logging process.

LOG CALL FROM THE SERIAL NUMBER OR LOCATION

- In the **Relates To** frame, select either the **Serial No.** or the **Location**.
- The associated Customer and Customer details will auto populate, and if the item selected is on Contract, the Contract Number will also auto populate.

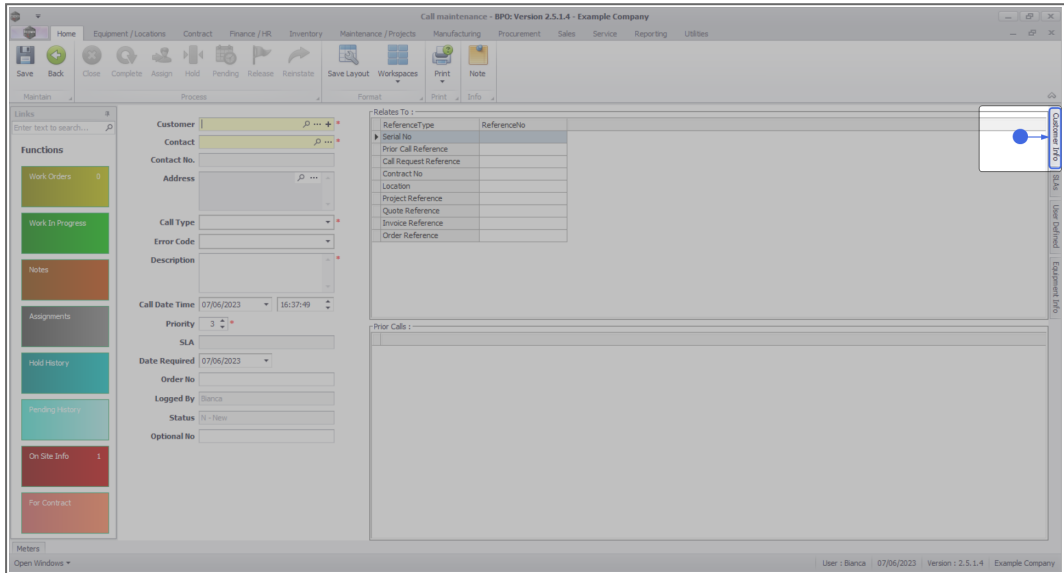
FIND CUSTOMER BY TEL NO

Alternatively, search for the customer by **Telephone Number**.

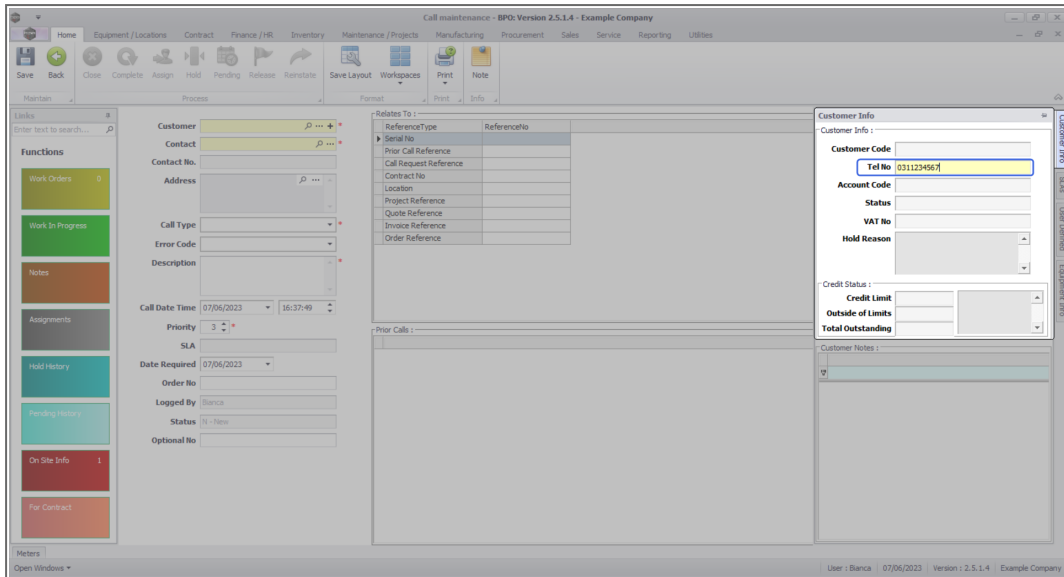


Note that the telephone number saved on the customer record, and the number you are searching for should not have any spaces.

- From the **Call maintenance** screen,
- Click on the **Customer Info** tab.



- In the Tel No field, type in the telephone number and press enter on your keyboard.
 - If the number matches a telephone number on a single Customer, the customer details will populate.
 - If a few customers have the same telephone number, a lookup will list display that you can select from.



- The associated Customer and Customer details will auto populate.

Related Topics

- [Introduction to Work Orders](#)
- [Calls - Add New Contact](#)
- [Calls - Edit Buttons](#)
- [Calls - Customers on Hold](#)

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