

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

SERVICE

CALLS - NOTES

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 <u>Call Centre Mode</u> notes.

Call notes can be used to capture any additional information for a call.

Ribbon Select Service > Calls



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New	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
 In Progress 	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num		Change Request			sin123		
() Hold	⊞ CN0000996	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - C00000054	DR	Select Call Type					
O AI	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123		_
 In Progress Hold 	CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin 123		
Pending	EE CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q AI	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance		11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Anaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
🕑 Hold	⊞ CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
All Idoemfontein	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
New	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
 New In Progress 	⊞ CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
() Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
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Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	SathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	SathSinNaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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• The Call Listing screen will be displayed.

¹BPO2 v2.5.1.3 or higher



- 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.

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Cape Town	E CN0000982	Young Electric		UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
New	■ CN0000976	Young Electric	19/11/2019			11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019			16:30:20	test another call email	ADM	Administration			095010015		
O Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019		Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
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Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
() AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	SathSinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
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• Select the **Call** you wish to work with.

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O New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
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() Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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• Click on the **Edit** button.



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	E CN0000959	Westwood Dynamic	11/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000959	Westwood Dynamic Westwood Dynamic	04/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000957	Westwood Dynamic	27/09/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000956	Westwood Dynamic	20/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019			03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	III cussosses						nadmassaux nadarra na statatarra	1000					Phone Product Collector	
	Count: 38	0												

- The **Call maintenance: Call ref. -** [call ref number] screen will be displayed.
- Call maintenance : Call ref. CN0005285 BPO: Version 2.5.0.8 Example Company v2.5.0.8 _ **•** × \$ Ŧ Home Equip ns Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement × 💾 🔇 🚱 🚱 🚣 📲 🐯 🚩 P 2 2 ۹ Close Complete Assign Hold Pending Release Reinstate Save Back Save Layout Workspaces Print Note Print 6 Relates To : -Links П. Equipn Customer Hope Works (Pty) Ltd P … + * ReferenceType Serial No ReferenceNo Contact Henry Rowe • ... م ment Info Prior Call Reference Call Request Reference Functions Contact No. 031 555 1234 Address Plot 91 Leaf Road Leaf Hills Pink Town Durban South *...* م Contract No Customer Info Location Forest Hills Centre Project Reference Quote Reference • Call Type Installation Invoice Reference Order Reference Error Code • SLAs Description Tier - Commercial Tier Test User Defined Call Date Time 16/09/2021 ▼ 08:00:00 ÷ Priority 2 🗘 * Prior Calls : -Description Tier - Commercial Tier Test
 CallDate
 CallTime

 16/10/2021
 08:00:00

 16/09/2021
 08:00:00

 17/08/2021
 08:00:00
 SLA 0.00 CalReference CN0005291 . Date Required 16/09/2021 -CN0005285 CN0005277 Order No
 17/07/2021
 08:00:00

 17/06/2021
 08:00:00

 18/05/2021
 08:00:00
 CN0005269 Logged By JulandaK CN0005260 CN0005255 Tier - Commercial Tier Test Status N - New
 17/04/2021
 08:00:00
 Tier - Commercial Tier Test

 17/03/2021
 08:00:00
 Tier - Commercial Tier Test

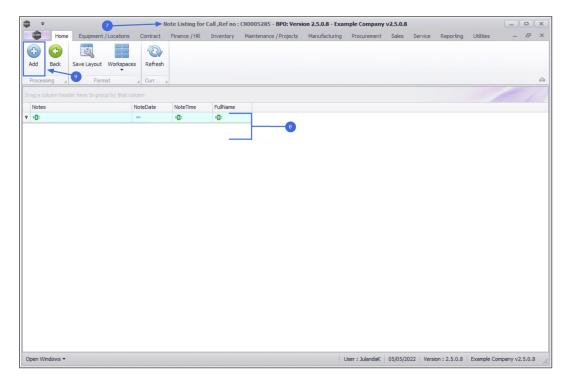
 17/02/2021
 08:00:00
 Tier - Commercial Tier Test
 CN0005247 Optional No CN0005241 CN0005233 On Site Info ٠ Meters User : JulandaK 05/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8 Open Wind
- Click on the Notes tile.



- The Note Listing for Call, Ref no: [call ref number] screen will be displayed.
- Any notes that have been created for the call will be listed in the data grid.

ADD CALL NOTE

• Click on **Add**.



- The Add a new note for Call, Ref no: [call ref number] screen will be displayed.
 - Note: Click in the text box to type the note details related to the call.
 - Note Date / Time: These fields will display the current date and time.
 - Date: Click to type in or use the down arrow to select and alternative date using



the calendar function.

- Time: Click to type in or use the arrow indicators to select an alternative time.
- **Employee:** The person currently adding the note will display in this field. Click on the down arrow to select a different employee.
- When you have finished adding the note details, click on **Save**.

	10	Ada	d a new note fo	or Call, Ref no	: CN0005285 - BPO: Ver	rsion 2.5.0.8 - Exa	ample Compar	ıy v2.5.0.8					
Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales S	Service Re	porting	Utilities	-	₽ X
Save Back													
Process													\$
Note	Meter readings to be se	ent through ev	very Friday after	5 pm	*								
			•		Ψ.								
Note Date / Time		3:18:48	\$										
Employee	Jade Rivers		•										
Open Windows 🕶						L	lser : JulandaK	05/05/2022	Version :	2.5.0.8	Example Cor	npany v2.	5.0.8 //.

- You will return to the updated **Note Listing for Call, Ref no:** screen.
- The Call Note Processing message will confirm that;
 - Note has been added to Call: [call ref number].
- Click on **OK**.



Calls - Notes

Add Back Processing Format Drag a column header here to group by that column Notes Note	Refresh Curr	Inventory Ma	intenance / Projects	Manufacturing	Procurement	Sales Se	rvice Reporting	Utilities	-	₽ ×
Add Back Save Layout Workspaces Processing Format In Drag a column header here to group by that column Notes Notes	Refresh Curr	a 🗖 c								\$
Drag a column header here to group by that column Notes Noted • noted	teDate NoteTime	a 🗖 c								~
Drag a column header here to group by that column Notes Noted • noted	teDate NoteTime	a 🗖 c								
Notes Note • • •	teDate NoteTime	a 🗖 c								
9 mile =	4 0 0	a 🗖 c								
 Decentedungs to be serie unough every 05/0; 	13:18:48	Jaue Rivers								
Open Windows +	G	all Notes Processin Note has	ng been added to Call :	OK		050570077	Version : 2.5.0.8	Evanda Cas		

- The note details can now be **viewed** from this screen.
- Click on **Back** to return to the Call maintenance screen.

🔹 👻 Not	e Listing for C	all ,Ref no : (CN0005285 - BPO: Versi	on 2.5.0.8 - Exar	nple Company	v2.5.0.8					
Home Equipment / Locations Contract F	inance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales !	Service	Reporting	Utilities	-	₽ X
Add Back Save Layout Workspaces Refresh											
Processing 14 mat Curr											\Diamond
Drag a column header here to group by that column											
Notes	NoteDate	NoteTime	FullName								
Y 10:	-	#IIIC	R C								
Meter readings to be sent through every Friday after 5 pm	05/05/2022	13:18:48	Jade Rivers	13							
Open Windows 🕶				L	lser : JulandaK	05/05/2022	2 Versi	on : 2.5.0.8	Example Co	mpany v2	5.0.8



Calls - Notes

MNU.122.006

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