

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

SERVICE

CALLS – WORK IN PROGRESS

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.

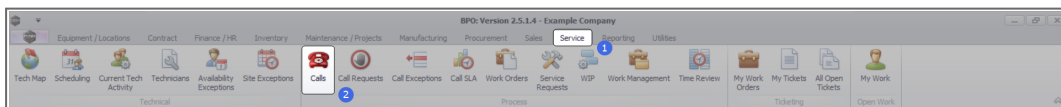
The Work in Progress (WIP) screen displays:

- **Parts** that have been issued or
 - **Third Party Services** that have been received
- but have not yet been invoiced.

If these items are **non** billable, the work order, call or project will **not** have been closed yet.

Return Requests can be raised for **Internal Assets** to return the item to the **Asset warehouse**.

Ribbon Select **Service > Calls**



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

¹BPO2 v2.5.1.3 or higher

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Salematic Driver	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			19-12/202		3
EN0001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			en123		3
EN0000998	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Barcode	IGR	New/Def Rental				BPQZ TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		06:58:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
EN0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
EN0000982	Young Electric	18/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000980	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our manager email entered	ADM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ADM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000964	Red PC / IT Shop	20/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- 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.

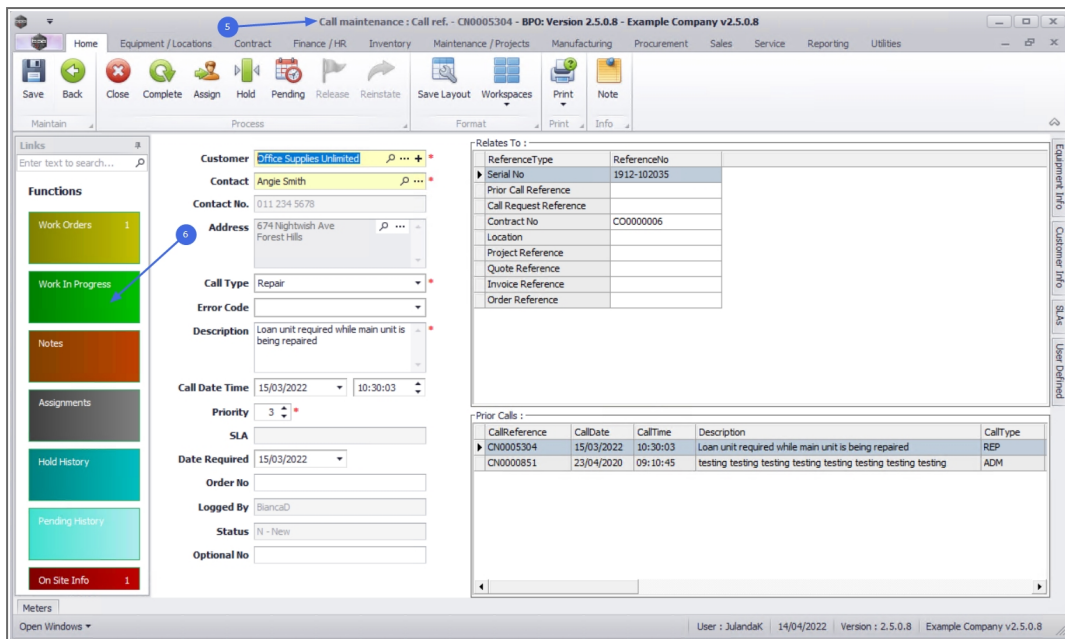
- Select the **Call** you wish to work with.

CallRef	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
CH0001003	Young Electric	12/12/2022	12:00:00	Awaiting Acceptance - Jon Hilton	Test account balance	CR	Change Request			107		3
CH0001002	Silverleaf Drive	12/12/2022	06:38:20	Awaiting Acceptance - Nery Thompson	Test call for account balance manual	CR	Select Call Type			107		3
CH0001001	Young Electric	20/11/2022	11:29:19	Unassigned	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
CH0000992	Top Value Hire	20/10/2022	14:58:17	Awaiting Acceptance - Daniel Edgewood	Loan machine for temporary high volume printing requirement	SRV	Service				TOP1234567	3
CH0000991	Apple Juice Inc	04/03/2022	05:36:15	Unassigned	Contact Closure - C0000055	CR	Select Call Type					3
CH0000989	Derton / Technologies	13/04/2022	09:00:00	Unassigned	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
CH0000988	Young Electric	12/12/2022	06:00:00	Unassigned	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
CH0000987	Young Electric	06/04/2022	06:00:00	Unassigned	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
CH0000986	Young Electric	07/04/2022	06:00:00	Unassigned	Call logged 3 days ago for elapse time checks	CR	Select Call Type			an123		3
CH0000985	Hope Works (Pty) Ltd	18/04/2022	05:09:13	Unassigned	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
CH0000984	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Unassigned	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
CH0000983	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Unassigned	Test elapsed time 2 - day prior	TEST	Testing			52121415946		3
CH0000982	Young Electric	18/04/2022	06:00:00	Unassigned	Test elapsed hours 1	TEST	Testing			an123		3
CH0000981	Young Electric	18/11/2019	11:24:29	Awaiting Acceptance - Bianca Du Toit	Test with site manager email entered	ADM	Administration			107		3
CH0000974	Hope Works (Pty) Ltd	18/11/2019	06:30:20	Awaiting Acceptance - Bianca Du Toit	Test another call email	ADM	Administration			095011015		3
CH0000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Awaiting Acceptance - Bianca Du Toit	Test new call for email description in body	CR	Change Request			095011015		3
CH0000971	Westwood Dynamic	29/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000970	Westwood Dynamic	22/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
CH0000968	Green Tea Supplies	16/11/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
CH0000967	Westwood Dynamic	15/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000966	Westwood Dynamic	08/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000965	Westwood Dynamic	02/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000964	HOCK PC - IT Shop	26/10/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
CH0000963	Westwood Dynamic	25/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
CH0000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
CH0000960	Westwood Dynamic	18/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000959	Westwood Dynamic	11/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000958	Westwood Dynamic	04/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000957	Westwood Dynamic	27/09/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000956	Westwood Dynamic	20/09/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
CH0000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
CH0000954	Green Tea Supplies	17/09/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• Click on the **Edit** button.

• The **Call maintenance : Call ref - [call reference number]** screen will display.

• Click on the **Work In Progress** tile.



- The **Work in Progress for Call, Ref No : [call ref. number]** screen will be displayed.

The screen displays both **stock** or **internal assets** that have been issued, as well as **Third Party Services** that have been received

If the items or services are billable, then they have **not** been invoiced.

If the items are non-billable, the linked work order, call or project has **not** yet been closed.

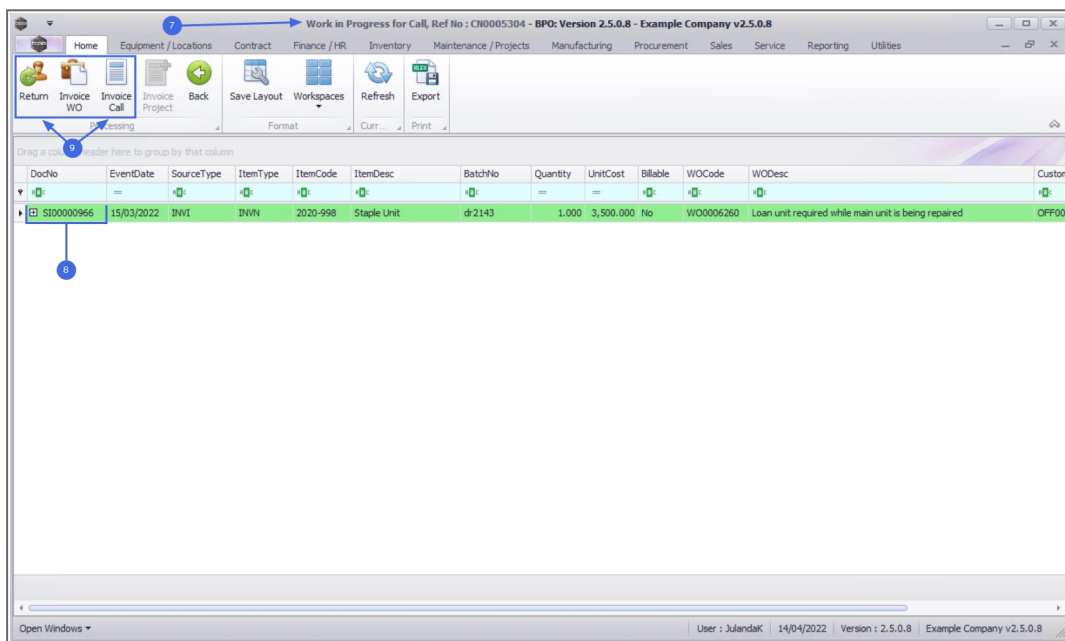
- The **Doc No** column displays the, Work in Progress reference number for a **part** with a **SI** prefix to the number.
 - A **service** Work in Progress will display as **SERVICE**.

WIP PROCESSING

- From this screen, you can:
 - Do a **Return Request** for an item or service,
 - **Invoice** a **work order**, or
 - **Invoice Call**.



The Invoice Project button has been greyed out indicating that a Project cannot be Invoiced from this screen.

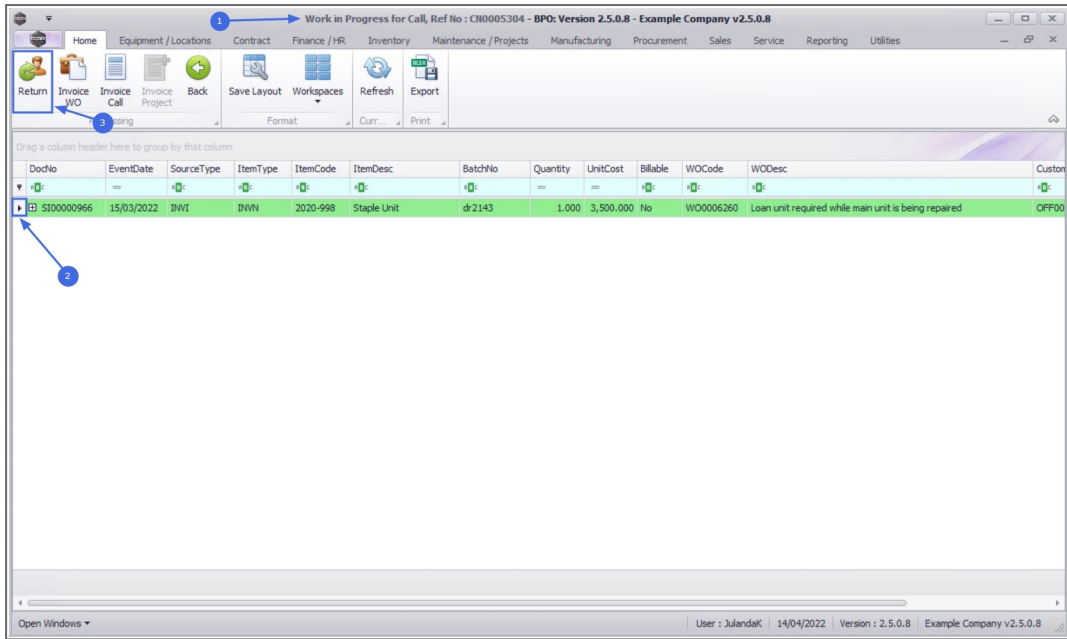


RETURN REQUEST

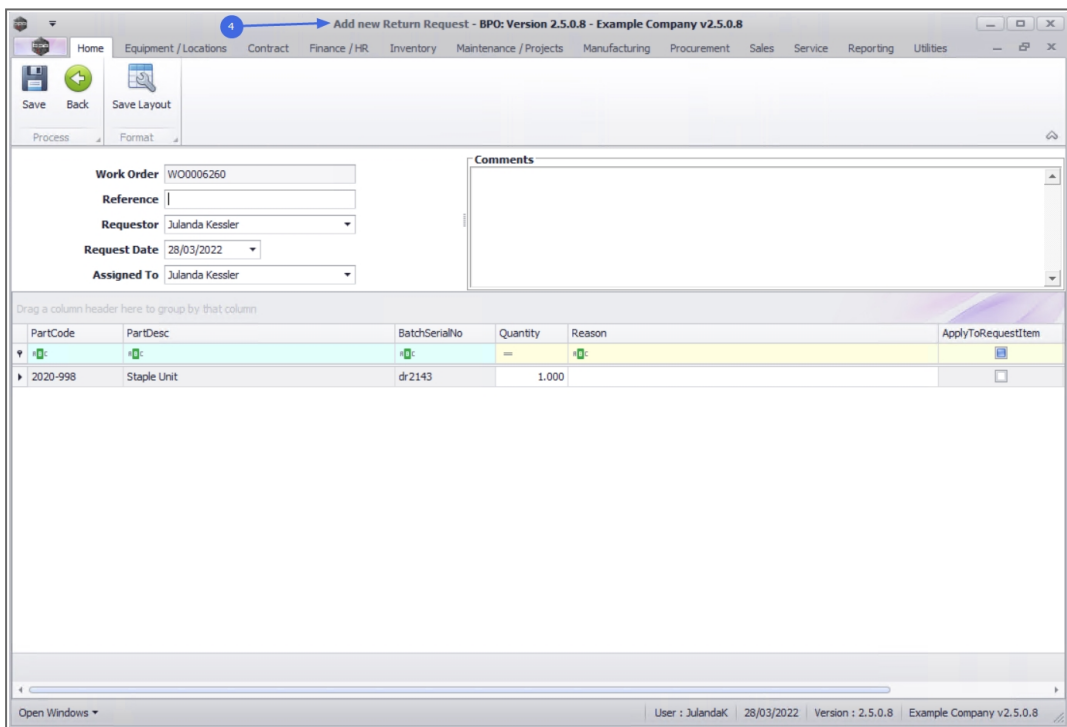
- From the **Work in Progress for Call, Ref No: [call ref number]** screen,
- Click on the **row** of the Service or Part you wish to return.
- Click on the **Return** button.



Short cut key: Right click to display the **Process** menu list. Click on **Return**.



- "The Add new Return Request screen will be displayed." on page 2

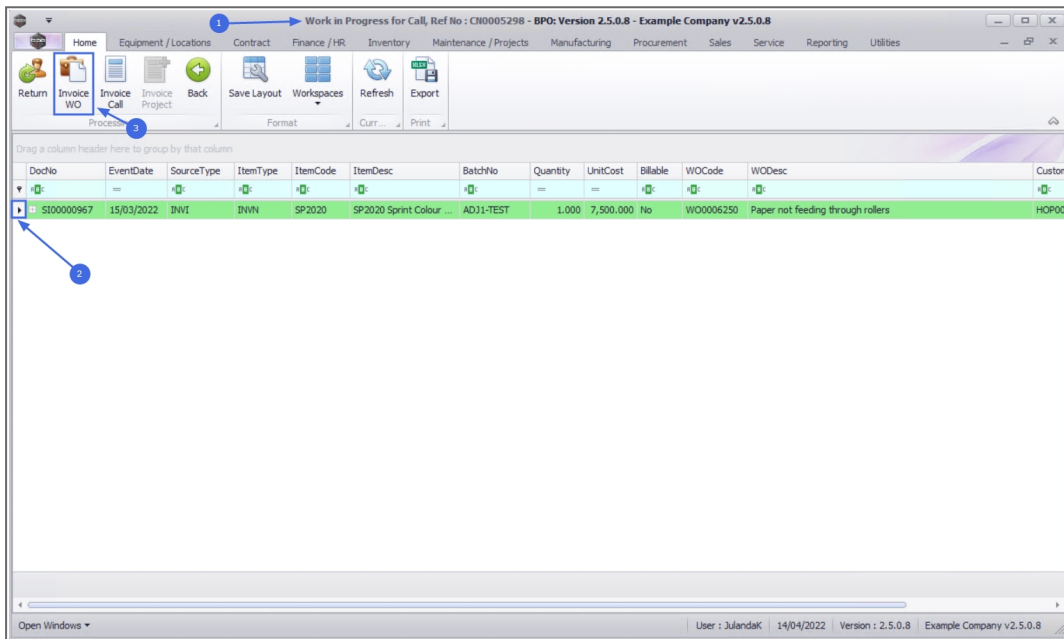


INVOICE WORK ORDER

- From the **Work in Progress for Call, Ref No. :** [call ref number] screen,
- Click on the **row** of the Service or Part you wish to Invoice.
- Click on **Invoice WO**.



Short cut key: Right click to display the **Process** menu list. Click on **Invoice WO**.



- "The Add new Return Request screen will be displayed. " on page 2

4 → Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Delete Item Save Layout

Maintain Format

Customer Name: Office Supplies Unlimited
 Contact Name: Commercial
 Salesman: Julanda Kessler
 Billing Customer: Office Supplies Unlimited
 Invoice Currency: South African Rand
 Tax Rate: 15.00

Reference: []
 Status: New
 Date & Time: 28/03/2022 14:25:10
 Billing Contact: []
 Exchange Rate: 1

Billing address: []
 Shipping address: []

Suppress Line Detail on Print

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Warranty	12MSW	12 Month Suppl...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000
	Select type...											

Comment: []

Sub Total: 955.65
 VAT: 143.35
 Grand Total: 1,099.00

Open Windows User: JulandaK 28/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

INVOICE CALL

- From the **Work in Progress for Call**, Ref No: [call ref number] screen,
- Click on the **row** of the Service or Part that you wish to invoice.
- Click on **Invoice Call**.



Short cut key: Right click to display the **Process** menu list. Click on **Invoice Call**.

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCCode	WODesc
SI00000966	15/03/2022	INVT	INVN	2020-998	Staple Unit	dr2143	1.000	3,500.000	No	W00006260	Loan unit required while main unit is being repaired

- "Invoice Header" on page 2

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Labour	ADMIN	Administration	Administration			1.000	98.000	10.000	0.000	107.800	107.800
	Select type...											

Sub Total: 107.80
VAT: 16.17
Grand Total: 123.97

MNU.122.043

