

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 Asset**s to return the item to the **Asset warehouse**.

Ribbon Select Service > Calls



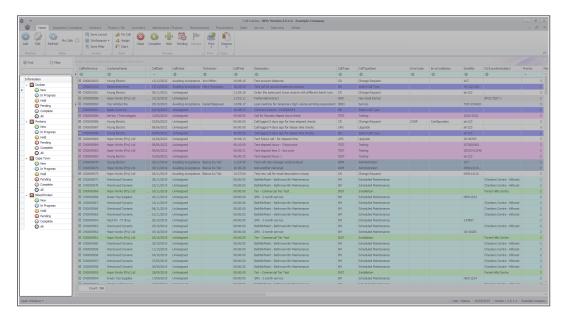
• The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher



Home Equipment / I	ocations Contract	Finance / HR Inventor	ry Maintenance	/ Projects Manufac	turing Procureme	nt Sales	Service Reporting Utilities							-
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ormation	E CN0001003	Young Bectric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	08	Change Request			107		
Durban	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Cal Type			19-12/1202		-
New	E CN0001001	Young Electric	29/11/2022	UnAssigned	risely monipotent	11:29:19	Order the same part twice receive with different batch num-		Change Request			sin123		-
In Progress	E CN0000995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Hold	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Deniel Balances	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD	and that is	
Pending	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned	Danie bagowen	16:38:15		DR	Select Call Type			10-125-640		1
Complete	E CN0000999	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		
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In Progress	CN0000985	Young Electric	07/06/2022	UnAssigned		05:00:00		DR	Select Cal Type			sh123		-
() Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/2022			16:09:13	Call logged 3 days ago for elapse time checks Test future call - for elapsed time	UPG				20-98765		-
Pending	E CN0000984		08/06/2022	UnAssigned		05:10:00	Test Houre call - for evapsed one Test elapsed hours - 2 days prior	TEST	Upgrade Testing			AT5000000		
Complete		Hope Works (Pty) Ltd										A15000000		
O Al	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing					
Cape Town	E CN0000982	Young Electric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
New		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	Awaiting Acceptance		16:30:20	test another call email	ADM CR	Administration			095011015		
O Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00			Change Request			095011015		
Pending O Complete	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinNeint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
O Al	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
tioenfontein	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
New New	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	514	Scheduled Maintenance			NEW 1234		
In Progress	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
Hold	E CN0000966	Westwood Dynamic				03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
G Al	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	⊞ CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		08:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
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- 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.



Home Equipment / Lu d Edit Refresh My Call	🔯 Save Lay	out 💰 My Call 🥶	Q •	ald Pending Release	2		Service Reporting Utilities							
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formation	E CN0001003	Young Bectric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samenthas Diner	12/12/2022			16:18:30	Test call for account balances manual.	DB	Select Cal Type			19-12/1202		
New New York New Y	E CN0001001	Young Bectric		UnAssigned		11:29:19	Order the same part twice receive with different batch num.	102	Change Request			#n123		
In Progress	E CN0000995	Hope Works (Ptv) Ltd					ForBentalContract	NDR	New Deal Rental				BPO2 TEST 1	
O Hold	E CN0000992	Top Vehicle Hire		Awaiting Acceptance	Daniel Balonssen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		_
Pending Complete	E CN0000991	Apple Juice Inc		UnAssigned	co conjuned	16:38:15	Contract Closure - C00000054	DR	Select Cal Type	_	_	101 100 1000		_
Complete Al	E CN0000989	Derton / Technologies		UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing					
Pretoria	E CN0000988	Young Electric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONE	Confouration	sin123		
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In Progress	E CN0000985	Young Electric		UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
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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		Awaiting Acceptance		11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd		Amaiting Acceptance		16:30:20	test another call email	ADM	Administration			095010015		
() Hold	E CN0000972	Hope Works (Pty) Ltd		Awaiting Acceptance	Blanca Du Tolt	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
0 Al	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
tiloemfontein New	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	514	Scheduled Maintenance			NEW 1234		
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() Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
 Complete 	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
Q AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
_	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DAST.	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000956	Westwood Dynamic		Unitssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
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• Click on the **Edit** button.

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Durban		Young Bectric		Awaiting Acceptance		10:09:10	Test account balances	CR	Change Request					
O 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			11:29:19	Order the same part twice receive with different batch num		Change Request			sin123		
() Hold	E CN0000996	Hope Works (Pty) Ltd	31/10/2022			11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	► CN0000992	Top Vehicle Hire		Assaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
 Complete 	E CN0000991	Apple Juice Inc	24/10/2022			16:38:15	Contract Closure - C00000054	DR	Select Call Type					
O Al	E CN0000989	Derton / Technologies	13/06/2022			09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
 New 	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986					05:00:00	Call logged 3 days ago for elapse time checks	DR.	Select Call Type			sin 123		
() Hold	EE CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20/98765		
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Cape Town	E CN0000982		10/06/2022			05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
New New	E CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019		Bianca Du Toit		test another call email	ADM	Administration					
() 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						
Pending	E CN0000971	Westwood Dynamic		UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
C Complete	EE CN0000970	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
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tioemfontein	E CN0000968	Green Tea Supples		UnAssigned		08:00:00	2MS - 2 month service	54	Scheduled Maintenance			NEW 1234		
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Pending	E CN0000965	Hack PC - IT Shop	01/11/2019			03:00:00	SathSrMant - Bathroom Bin Mantenance 2015 - 2 month service	524	Scheduled Maintenance			147807	Checkers Centre - Hildrest	
O Complete	E CN0000964	Hack PC - IT Shop Westwood Dynamic	26/10/2019			08:00:00	245 - 2 month service BathSinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance Scheduled Maintenance			14/807	Checkers Centre - Hilcrest	
O Al													uneours centre - Hildrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019			03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
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	EE CN0000960	Westwood Dynamic	18/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000959	Westwood Dynamic	11/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019			03:00:00	BathBinNaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	⊞ CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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	Count: 386													

- The **Call maintenance : Call ref -** [call reference number] screen will display.
- Click on the Work In Progress tile.



	Call main	tenance : Call ref C	N0005304 - BPO: Ve	rsion 2.5.0.8 -	Example Cor	npany v2.5	0.8			_ – ×
Home Equipment / Locations (Contract Finance / HR	Inventory Mainten	ance / Projects M	anufacturing	Procurement	Sales	Service	Reporting	Utilities	_ & ×
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	Forest Hills		Location							
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Notes Call Date Tir	being repaired ne 15/03/2022 ▼ 1	nain unit is 0:30:03 🛟								-
Notes	being repaired	~	Prior Calls :							
Notes Call Date Tir Assignments Prior	being repaired ne 15/03/2022 ▼ 1	~	Prior Calls : CallReference	CaliDate	CallTime	Description				CalType
Notes Call Date Tir Assignments Prior S	being repaired ne 15/03/2022 • 11 ity 3 •	~	CallReference CN0005304	15/03/2022	10:30:03	Loan unit r	equired while	main unit is bei		CallType REP
Notes Call Date Tir Assignments Hold History Date Requir	being repaired ne 15/03/2022 • 11 ity 3 • • LA ed 15/03/2022 •	~	CallReference			Loan unit r	equired while		ng repaired sting testing testing	CalType
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• 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
If the items or services are billable, then they have not been invoiced.
ject 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.

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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.



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• "The Add new Return Request screen will be displayed. " on

page 2

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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.

P Short cut key: Right click to display the Process menu list. Click on Invoice WO. v2.5.0.8 Inve Return Invoice 2 ۲ 🔁 4 Refresh Export Invoice Back Save Layout Workspaces WODe 9 FOC R 🖬 C 0 I SI 14/04/2022 Version : 2.5.0.8 Example Con pany v2.5.0.

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



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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.



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• "Invoice Header" on page 2

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