

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

# SERVICE

## **CALLS - ON SITE INFO**

**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 Compatibility<sup>1</sup>. 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.

**On Site Info** is the Equipment Asset Listing screen that has been filtered to only display serialised items that belong to the customer (customer assets) or internal assets that are on contract with the customer.

Ribbon Select Service > Calls



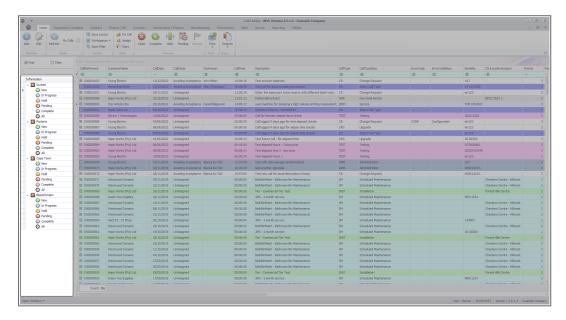
• The **Call Listing** screen will be displayed.

<sup>1</sup>BPO2 v2.5.1.3 or higher



	Save La	Finance / HR Inventor		. And 10-		in Suica	Service Reporting Utilities							-
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Information	EE CN0001003	Young Electric	13/12/2022	Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
🗸 🔯 Durban	E 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		
New	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num-	CP.	Change Request			sin123		
In Progress	E CN0000995	Hope Works (Ptv) 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	Denial Releases	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Pending	E CN0000992	Apple Juice Inc	25/10/2022		varie vagovien	14:09:17	Contract Closure - C00000054	DR	Select Cal Type	_		10-123-000		
Complete				UnAssigned		09:00:00	Call for Monday elarge hours therk	DR				2020-2222		
O AI	E CN0000989	Derton / Technologies	13/06/2022						Testing					
Pretoria     New	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged S days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		_
<ul> <li>In Progress</li> <li>Hold</li> </ul>	CN0000986	Young Electric	07/06/2022			05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
Pending	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	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		06:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
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		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
(A) 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		08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
C Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08-00-00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilmest	
O AI	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hils Centre	
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New	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance			14.11 22.71	Checkers Centre - Hildrest	
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Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMeint - Bathroom Bin Meintenance	514	Scheduled Maintenance				Checkers Centre - Hillcrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
O 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	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		03:00:00	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	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	SathBinMaint - Bathroom Bin Maintenance	94	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	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	
	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
							Red Room Red Contractor	-						
	Count: 38	6												

- 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.



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	Y ID:	<pre>/D:</pre>	Calcase	<ul> <li>California</li> <li>AD:</li> </ul>	IC:	<d:< th=""><th>i0:</th><th><ul> <li>Call type</li> <li>D:</li> </ul></th><th>(D:</th><th>(C):</th><th><pre>/D:</pre></th><th>ill:</th><th>(D)</th><th>Priprit</th></d:<>	i0:	<ul> <li>Call type</li> <li>D:</li> </ul>	(D:	(C):	<pre>/D:</pre>	ill:	(D)	Priprit
formation										10.	10-		10-	
Durban	E CN0001003	Young Electric		Awaiting Acceptance		10:09:10	Test account balances	CR	Change Request			107		
() New	■ CN0001002	Samanthas Diner			Mary Thompson	16:18:30	Test call for account balances manual.		Select Call Type			19-12/1202		
In Progress	E CN0001001	Young Electric		UnAssigned		11:29:19	Order the same part twice receive with different batch num		Change Request			sin123		
🕖 Hold 👝	E CN0002995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	_
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<ul> <li>Complete</li> </ul>	CN0000991							UR						
_ O AI	E CN0000989	Derton / Technologies		UnAssigned		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     In Progress	E CN0000987	Young Electric		UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
Hold	■ CN0000986	Young Electric		UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Cal Type			sin 123		
Pending	EE CN0000985	Hope Works (Pty) Ltd		UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q AI	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric		UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
New		Young Electric		Awaiting Acceptance		11:24:39	Test with site manager email entered	ADM	Administration			107		
<ul> <li>In Progress</li> </ul>	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
🕑 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	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 - Hillcrest	
_ O AI	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
D Bloemfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	\$24	Scheduled Maintenance			NEW 1234		
<ul> <li>New</li> <li>In Progress</li> </ul>	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending	E 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		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	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	BathBinNaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	SathSinNaint - 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 - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	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	
	E CN0000954	Green Tea Supplies		UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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	Count: 38	6												

• Click on the **Edit** button.

v						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
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mation	E CN0001003	Young Bectric		Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samenthas Diner	12/12/2022	Availing Acceptance	Nerv Thompson	16:18:30	Test call for account balances manual.	DB	Select Call Type			19-12/1202		
New York	E CN0001001	Young Bectric	29/11/2022			11:29:19	Order the same part twice receive with different batch num	CD.	Change Request			sin123		
<ul> <li>In Progress</li> </ul>	E CN0000995	Hope Works (Ptv) Ltd					ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
() Hold	E CN0000998	Top Vehicle Hine		Assailing Acceptance	Desciel Releases		Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Pending	E CN0000992	Apple Juice Inc	25/10/2022			14:09:17		DR	Select Cal Type					
Complete														
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 Bectric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New     In Progress	E CN0000987	Young Electric		UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123		
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	E CN0000985	Hope Works (Pty) Ltd		UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O Al	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 Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
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		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
() 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 - Hildrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
O AI	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
5 tioemfontein	E CN0000968	Green Tea Supples		UnAssigned		03:00:00	2MS - 2 month service	54	Scheduled Maintenance			NEW 1234		
New	FR CN0000957	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
In Progress	E CN0000966	Westwood Dynamic	08/11/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
() Hold	E CN0000965	Westwood Dynamic	01/11/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending     Convolute	E CN0000964	Hack PC - IT Shop		UnAssigned		03:00:00	245 - 2 month service	54	Scheduled Maintenance			147807		
Complete     Al	E CN0000963	Westwood Dynamic	25/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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	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	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000936	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies		UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	III cusasara						Redemander Redecces Redecision	1914					Martine Press, Albert	
	Count: 386													

- The **Call maintenance : Call ref -** [call reference number] screen will display.
- Click on the **On Site Info** tile.



• •	5	Call mainte	mance : Ca	ll ref C	N0005300	- BPO: Version 2	2.5.0.8 - Ex	ample Co	mpany v2	.5.0.8					
Home Equipm	ent / Locations Contra	act Finance / )	HR Inve	ntory	Maintenand	e / Projects Ma	anufacturing	Procur	rement s	Sales S	Service I	Reporting	Utilities	-	8 )
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	Contact	Francis Parish		م	••• *	Prior Call Re	ference								
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	6 Address	29 Dune Ave		م		Contract No									
		New Town Durban				Location									
		Durban			-	Project Refe									
On Site Info 🖌 1	Call Type	Denela				Quote Refer		_							
	Call Type	Repair			•	Invoice Refe Order Refer									
	Error Code				-	Order Keler	ence								1
For Contract	Description	Printer displayin	g error code	:	÷										
Time Review	Call Date Time	18/01/2022	▼ 12:	51:45	÷										
	Priority	3 🗘 *				Prior Calls :									
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			_			CN0005300	18/	01/2022	12:51:45	Printer	r displaying	error code			
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Ipen Windows 🔻								User : Ju	landaK 1	3/05/2022	2 Version	: 2.5.0.8	Example Co	mpany v2.5	i.0.8

## **ON SITE INFO LISTING**

• The Asset listing or Machine List for [Customer Name] screen will be displayed.

¥					Machino	e List for	Derton / To	echnologies	- BPO: Ve	rsion 2.5	.1.4 - v251	Example Co	ompany					_ 8
Home Equi	pment / Location	Contract F	Finance / HR	Inventory	Maintenance / Pro	ojects	Manufacturi	ing Procu	rement	Sales	Service	Reporting	Utilities					- 8
id Edit Delete	View Save I	ayout Workspaces	Save Filter	Durban	Refresh	Revalu	e Convert	Euy Back	Print	Export	Reports							
Maintenance		Format		Curr			Process		Print		Reports							
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er text to search >	AssetReg	lo PartCode	Descript	tion			CategoryDe	esc		Parent	Type	ModelNo	SerialNo	Status	StartDate	Asset	WOAttachment	IsFixedAsset
unctions	Y 400	4 <b>0</b> 4	* <b>O</b> C				* <b>D</b> :			<ul> <li>••••</li> </ul>		••••	<ul> <li>(D)</li> </ul>	1 <b>0</b> 0	-	×0:	* <b>0</b> :	4 <b>0</b> 4
	•	SP2020	SP2020	Sprint Colour Mult	i Functional Copie	ar .	Hardware			Wareh	ouse	SP 20 20	abc147c	A	07/05/2014	No	No	No
		SP2020	SP2020	Sprint Colour Mult	i Functional Copie	er 🛛	Hardware			Contra	ct	SP2020	2020-102046	A	03/07/2014	No	No	Yes
		SP1912	SP19-12	2 Colour Copier			Hardware			Contra	ct	SP1912	1912-102045	A	03/07/2014	No	No	Yes
		SP2020	SP2020	Sprint Colour Mult	i Functional Copie	5r	Hardware			Contra	ct	SP2020	20-457896	A	07/01/2015	No	No	No
Project History	AREGODO	80 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	er 🛛	Hardware			Wareh	ouse	SP2020	2020-9896	A	22/02/2017	No	No	No
	AREG000	88 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	er 🛛	Hardware			Wareh	ouse	SP2020	2020-9194	A	23/02/2017	No	No	No
	AREGODO	89 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	ar .	Hardware			Wareh	ouse	SP2020	2020-9195	A	23/02/2017	No	No	No
leters	AREGODO	90 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	sr .	Hardware			Wareh	ouse	SP2020	2020-9196	A	23/02/2017	No	No	No
	AREGODO	92 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	er .	Hardware			Wareh	ouse	SP2020	2020-9198	A	23/02/2017	No	No	No
	AREGODO	97 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	er .	Hardware			Wareh	ouse	SP 20 20	220-8084	A	23/02/2017	No	No	No
History	AREG000	00 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	ar .	Hardware			Wareh	ouse	SP2020	2020-8087	A	23/02/2017	No	No	No
nisiory	AREG000	92 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	57	Hardware			Wareh	ouse	SP2020	2020-43255	A	16/05/2017	No	Yes	No
	AREG000	25 2020-856	Drum				Accessories	1		Wareh	ouse		2020-1111	A	23/05/2017	No	No	No
	AREG000	26 2020-856	Drum				Accessories			Wareh	ouse		2020-2222	A	23/05/2017	No	No	No
	AREG000	08 SP2020	SP2020	Sprint Colour Mult	i Functional Copie	er .	Hardware			Invoio		SP2020	M00019120000	A	13/02/2018	No	No	No
Warranties Notes Documents																		
(																		

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## **ADD EQUIPMENT**

• Click on Add.

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ter text to search 🔎		AssetRegNo	PartCode	Description		CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsse	t
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	Þ	AREG000249	SP1818	Sprint copier		Hardware	Contract		1818-0890	A	01/06/2017	No	No	
		AREG000250	SP1818	Sprint copier		Hardware	Invoice		1818-0957	А	01/06/2017	No	No	
		AREG000252	SP1818	Sprint copier		Hardware	Invoice		1818-6589	Α	01/06/2017	No	No	
		AREG000296	SP1818	Sprint copier		Hardware	Contract		!^&[]	Α	18/08/2017	No	No	
Project History		AREG000411	SP500	Sprint Colour	Copier	Hardware	Contract		AKM001002	A	15/02/2021	No	No	
Meters														
Meters History														
History														

- The **Equipment for Customer** : [customer code] screen will be displayed.
- Add the Customer asset details as required and click on **Save**.

For a detailed handling of this topic refer to Assets - Add Customer Asset Details



•	0	Equipment for Customer : BIG00	001 - BPO: Version 2.5.0.8 - Examp	ole Company v2.5.0.8		_ <b>D</b> X
Home Equipmen	nt / Locations Contract	Finance / HR Inventory Main	tenance / Projects Manufacturing	Procurement Sales Service	e Reporting Utilities	_ & ×
Save Back Save Layout	t Workspace					
Process 10 For	mat "					
Links 4				Finance		4
Enter text to search P	Branch	Durban v	•	Cost	£	0 \$
Functions	Serial No	000001	•	Replacement Cost	t	0 ‡
	Asset Reg No	000002		Is Finance	±	
WO History	Customer	Big Bargains	*	Finance Co		•
	Address	29 Dune Ave ,0 A New Town	*	Finance Type	•	-
		Durban *		Payment Type		•
Project History		Belinda Sharman 🔻		Payment Day	1 🗘	
	Start Date			Payment Amount	:	0 🗘
	Priority	3 🗘 *		Payment Star		
Meters	SLA Hours	2 🗘	1.	Payment End		
	Part No.		*	Is Escalated		
History		Test Part 🗘		Escalation Amount		0 ‡
T IIS COT Y	Model No. Category	1023		Escalation Period		0 ‡
		Customer Assets	*	Travel Rate		0 🛊
BOM		Customer Asset Warehouse		Refurbishment Date		• •
	Loan Unit			Depreciation Star		
	In Service	WO Notification		Useful Life	0 0	
Warranties 1	Rotable	Tasks		Is Fixed Asset	:	
				Operational Status	<b>i</b>	
Notes						
				Finance Other Data	User Defined	
Open Windows 🕶				User : JulandaK 13/05/2022 Ve	rsion : 2.5.0.8 Example C	ompany v2.5.0.8

## **EDIT EQUIPMENT**

After an asset is created, you may wish to edit certain attributes and details of the asset. Only certain asset details can be edited. You may have <u>user</u> <u>security rights</u> set in your <u>company configuration</u> whereby a control may be applied to these editing rights. For example, only a manager can edit certain details, for example, incorrect serial number input (which affects stock reports) but an administrator can edit other less impactful details.

It is important to note that if the serial number is edited for a company asset, <u>all</u> stock reports will be affected.

Explanations for all the **Details** and **Finance** fields can be found in Introduction to Assets.

- From the Machine List for [customer name] screen,
- Click on the **row** of the asset detail you wish to make changes to.
- Click on **Edit**.



Home Equip	1- ment / Locations			er Big Bargains - B ventory Maintena	PO: Version 2.5	Manufacturin			Service	Reporting U	Itilities	_ 0	
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dd Edit Delete	View Save Lay	out Workspaces	Save Filter	All	Refresh	Revalue Conv	ert Buy Back	Print Expo	rt	Reports			
Maintenance	3	Format	4	Current		Proce	SS	a Print	4 F	Reports 4			
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ter text to search	AssetRegNo	PartCode	Description		CategoryDesc	ParentType	ModelNo	SerialNo	Status	s StartDate	Asset	IsFixedAss	et
Functions	♥ R <b>I</b> C	* <b>0</b> ¢	R C		#IIIC	1 <b>0</b> 1	a 🛛 c	• • • • • • • • • • • • • • • • • • •	88C	-	8 <b>0</b> 0	* <b>0</b> :	
	AREG000249	SP1818	Sprint copier		Hardware	Contract		1818-0890	A	01/06/2017	No	No	
	AREG000250	SP1818	Sprint copier		Hardware	Invoice		1818-0957	A	01/06/2017	No	No	
	AREG000252	SP1818	Sprint copier		Hardware	Invoice		1818-6589	Α	01/06/2017	No	No	
	AREG000296	SP1818	Sprint copier		Hardware	Contract		!^&[]	Α	18/08/2017	No	No	
Project History	AREG000411		Sprint Colour	Copier	Hardware	Contract		AKM001002	A	15/02/2021	No	No	
	AREG000501	TEST 123	Test Part		Hardware	Warehouse	1023	000001	A	13/05/2022	No	No	
Meters					Hai Gwai e		1010		2	15/05/2022			
History					THE UNKER				2	LOJOGLULL			

- The **Equipment Maintenance for Serial No : [**serial number] screen will be displayed.
- Make the required changes to the asset details and click on **Save**.

For a detailed handling of this topic refer to Assets - Edit - Asset Details



<b>\$</b> =	4 Equ	ipment Maintenance for Serial I	lo:000x1 - BPO: Version 2.5.0.8 - I	Example Company v2.5.0.8	_	
Home Equipme	ent / Locations Contract	Finance / HR Inventory Ma	intenance / Projects Manufacturing	Procurement Sales Service	Reporting Utilities -	占 X
	ut Workspace					\$
Links 4				Finance		1
Enter text to search P	Branch	Durban	•	Cost	0 🗘	
Functions	Serial No	000x1	•	Replacement Cost	0 🗘	
	Asset Reg No	AREG000502		Is Financed		
WO History	Customer	Big Bargains	* 0	Finance Co.	•	
	Address	100 Kings Road ,0	*	Finance Type	•	
		Chelded .	*	Payment Type	•	
Project History			•	Payment Day	1 🗘	_
	Start Date			Payment Amount	0 🗘	
	Priority	1 🗘 *		Payment Start		
Meters	SLA Hours	2 🗘		Payment End		
	Part No.		*	Is Escalated		-
		SP19-12 Colour Copier		Escalation Amount	0 ‡	
History	Model No.			Escalation Period	0 🗘	-
	Category			Travel Distance	0 🛊	
BOM			* 0	Travel Rate	0 🛊	
BOM		Customer Asset Warehouse		Refurbishment Date		
	Loan Unit In Service			Depreciation Start		
Warranties 1	Rotable			Useful Life Is Fixed Asset	0 ‡	
	Kotable	105K5		Operational Status		1
				operational status		
Notes						
				Finance Other Data	User Defined	
Open Windows 🔻				User : JulandaK 13/05/2022 Ver	sion : 2.5.0.8 Example Company v2.	5.0.8

## **DELETE EQUIPMENT**

- From the Machine List for [customer name] screen,
- Click on the **row** of the asset you wish to remove,
- Click on **Delete**.
- When you receive the **Delete Machine** message to confirm;
  - Are you sure you want to inactivate this machine,

code [serial number]?

• Click on OK.



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			AREG000249	SP 18 18	Sprint copier		Hardware	Contract		1818-0890	A	01/06/2017	No	No	
			AREG000250	SP1818	Sprint copier		Hardware	Invoice		1818-0957	Α	01/06/2017	No	No	
			AREG000252	SP 18 18	Sprint copier		Hardware	Invoice		1818-6589	Α	01/06/2017	No	No	
			AREG000296	SP1818	Sprint copier		Hardware	Contract		!^&[]	Α	18/08/2017	No	No	
Project Histo			AREG000411	SP500	Sprint Colour	Copier	Hardware	Contract		AKM001002	Α	15/02/2021	No	No	
		Þ	AREG000501	TEST123	Test Part		Hardware	Warehouse	1023	000001	A	13/05/2022	No	No	
Meters			2												
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History			2		Delete M		4 V want to inactiv	-		2001?					

## **VIEW EQUIPMENT**

- On the Machine List for [customer name] screen,
  - Note that there are 3 potential **Parent Types**;
    - ° Contract,
    - ° Invoice, and
    - Warehouse
  - Each of the Parent Types will affect which fields and field content will display on the screen.
- Click on the **row** of the customer asset you wish to view.
- Click on View.

For a detailed handling of this topic refer to View Client Machine



Home Equipm	ent / Locations C	ontract Finan	ice / HR Inventory Mainten	ance / Projects	Manufacturin	ig Procurem	ent Sales !			Itilities	- 8	3
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unctions	<b>▼</b> # <b>□</b> ¢	A D C	* <b>0</b> ¢	N C	1 <b>0</b> 1	a 🖬 c	*Oc	88C	-	n 🖬 c	* <b>0</b> :	
WO History	• AREG000249	SP 18 18	Sprint copier	Hardware	Contract		1818-0890	A	01/06/2017	No	No	
WO HISTORY	AREG000250	SP 18 18	Sprint copier	Hardware	Invoice		1818-0957	A	01/06/2017	No	No	
	AREG000252	SP1818	Sprint copier	Hardware	Invoice		1818-6589	A	01/06/2017	No	No	
	AREG000296	SP1818	Sprint copier	Hardware	Contract	1	!^&[]	A	18/08/2017	No	No	
Project History	AREG000411 AREG000502	SP500	Sprint Colour Copier SP 19-12 Colour Copier	Hardware	Contract Warehouse	1	AKM001002 000x1	A	15/02/2021 13/05/2022	No	No	
Meters												
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## **BUY BACK**

- From the Machine List for [customer name] screen,
- Click on the **row** of the asset you wish to buy back.
- Click on Buy Back.



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ter text to search P		AssetRegNo	PartCode	Description		CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsse	t
unctions	Ŷ	R C	* <b>0</b> ¢	REC		1 🛛 C	* <b>0</b> ¢	a 🛛 c	* <b>0</b> ¢	8 <b>8</b> C	-	* <b>0</b> 0	* <b>0</b> :	
		AREG000249	SP 18 18	Sprint copier		Hardware	Contract		1818-0890	A	01/06/2017	No	No	
WO History		AREG000250	SP 18 18	Sprint copier		Hardware	Invoice		1818-0957	A	01/06/2017	No	No	
		AREG000252	SP 18 18	Sprint copier		Hardware	Invoice		1818-6589	Α	01/06/2017	No	No	
		AREG000296	SP 18 18	Sprint copier		Hardware	Contract		!^&[]	Α	18/08/2017	No	No	
Project History	-	AREG000411	SP500	Sprint Colour	Copier	Hardware	Contract		AKM001002	A	15/02/2021	No	No	
		AREG000502	SP19-123456	SP19-12 Cold	our Copier	Hardware	Warehouse	SP19-12	000x1	A	13/05/2022	No	No	
Meters														
History		2												
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• The Process Work Order Information screen will display.

Refer to "Add Work Order Details" on page 4 for a detailed handling of this topic.



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Note::::::::::::::::::::::::::::::::::::	Note:	Functions	• •	P	•	•	•	•	•	•	•	-	•	•
Machine Cardination	Image: Second Secon		A	REG000249	SP 18 18	Sprint copier	Hardware	Contract		1818-0890	A	01/06/2017	No	No
Normal Harrison     Process     Work Order Date Time     13/05/2022     12:14:14	Process     Work Order Date Time 13/05/2022 • 12:14:14 •     Assigned To	WO History	A	REG000250	SP 18 18	Sprint copier	Hardware	Invoice		1818-0957	A	01/06/2017	No	No
Work Order Date Time	Work Order Date Time     Work Order Date Time     13/05/2022     12:14:14     Assigned To     Manda Kessler		A	REG000252	SP 18 18	Sprint copier	Hardware	Invoice		1818-6589	A	01/06/2017	No	No
Home Home Concel Process Work Order Date Time 13/05/2022  12:14:14	Work Order Date Time     13/05/2022     12:14:14       Assigned To     Manda Kessler		A	REG000296	SP 18 18	Sprint copier	Hardware	Contract		1~60	A	18/08/2017	No	No
Home Work Order Date Time 13/05/2022  12:14:14	Home Work Order Date Time 13/05/2022  Work Order Date Time 13/05/2022  Work Order Date Time 13/05/2022	Project History	A	REG000411	5P500	Process Work Order Informat	tion	-				15/02/2021	No	No
Work Order Date Time 13/05/2022  Virite 13/05/202	Work Order Date Time 13/05/2022  Work Order Date Time 13/05/2022			REG000502	SP 19-12			4			~	13/05/2022	No	No
					-			14.14			~			

#### PRINT

The Print option from the Machine List for Customer screen, will display a list of reports that can be generated and printed for an asset.

- From the Machine List for [customer name] screen.
- Click on the **row** of the asset you wish to print a report for.
- Click on **Print** to display the reports drop-down list.
- Click on the **Report** you wish to generate.
  - Assets Print Depreciation Report
  - Assets Print Depreciation Summary Report
  - Assets Print Period Depreciation Report
  - View Asset Listing Report
  - Assets Print Asset Register Report
  - View Asset Movement History Report
  - View Asset Scan History Report

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- View Asset Detail Report
- Assets Print Service History Report

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nter text to search P	A	ssetRegNo	PartCode	Description		CategoryDesc	ParentType	ModelNo	Period Deprec	iation	Asset	IsFixedAsset	t
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	A	REG000249	SP 18 18	Sprint copier		Hardware	Contract		18 Asset Register		No	No	
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	A	REG000252	SP 18 18	Sprint copier		Hardware	Invoice		18 Scan History		No	No	
	A	REG000296	SP 18 18	Sprint copier		Hardware	Contract		Equipment De	tail	No	No	
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Meters History							THE CROSE			vice History			
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History										vice History			

#### **FUNCTION TILES**



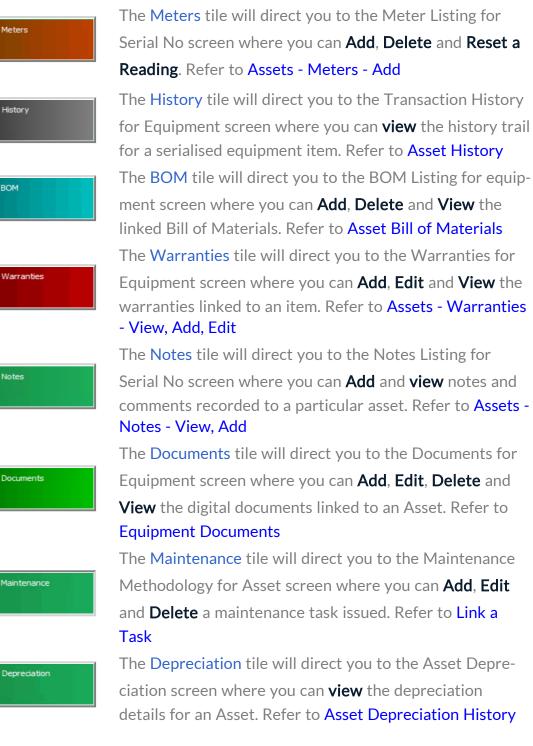
The Work Order History tile will direct you to the Work Orders for machine screen where you can Add, Edit, Delete and View a Work Order linked to the asset, as well Close, Complete and Reinstate a Work Order. Refer to Introduction to Work Orders

The **Project History** tile will direct you to the Project Listing for equipment screen where you can **Add**, **Edit**, **Apply** 



a Project Methodology, Adjust Project Baseline or Close a Project, as well as view Employee and Project Time and generate a Progress Report and Print a Project Delivery Note. Refer to Introduction to Projects





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