

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

SERVICE

CALL ADMINISTRATION - CALL SALES ORDERS

The Call Administration screen is part of the Extended Call Centre - Version Compatibility $^{\rm 1}$

The **Orders** tile is a quick way to navigate to the list of Orders related to the selected call.

THE CALL ADMINISTRATION LISTING SCREEN

Ribbon Select Service > Call Administration



• The Call Administration screen will be displayed.

¹BPO2 v2.5.1.3 or higher.



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runcu	0115	► E CN0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac	-	-	Service machine S/N: 1912-102036	SERV	Service			
Work	Orders 1	CN0000040 E CN0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac			Machine repair needed	REP	Repair			
		E CN0000042	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac			1 black toner for collection	TON	Toner Required			
		E CN0000047	Titan Group	47 31/07/2014	Awaiting Ac			1 black toner for collection Service required	SERV	Service			
Work	In Progress	E CN0000047	Westwood Dynamic	51 05/08/2014	Awaiting Ac			Toner for delivery	TON	Toner Required			
	arriogress	E CN0000055	Titan Group	57 07/08/2014	Awaiting Ac			Toner required	TON	Toner Required			
		E CN0000056	Young Electric	58 07/08/2014		Belinda Sha		Contract Closure - CO000021	DR	Select Call Type			
			Westwood Dynamic	59 08/08/2014	Awaiting Ac			Delver full set of toners	TON	Toner Required			
Notes		E CN0000058	Samanthas Diner	60 08/08/2014	Awaiting Ac			New machine	NDS	New Deal Sale			
			Westwood Dynamic	62 08/08/2014	-	Wesley Har.		Machine Rental Deal	NDR	New Deal Bental			
_		E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac			Machine service required	SERV	Service			
Assign			Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac			Test BPO fin tran	NDS	New Deal Sale			
		E CN0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac			Toner for delivery	TON	Toner Required			
		E CN0000070	Derton / Technologies	72 23/09/2014	-	Daniel Balgo.		Service machine	SERV	Service			
		E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac			Machine service required	SERV	Service			
			Derton / Technologies	75 25/09/2014	Awaiting Ac			test	NDS	New Deal Sale			
		E CN0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac			Service and toner required	SERV	Service			
			Titan Group	85 11/11/2014	Awaiting Ac			Magenta toner required	TON	Toner Required			
		E CN0000085	Panda Copiers	87 11/11/2014	Awaiting Ac			CO789	NDS	New Deal Sale			
			Westwood Dynamic	96 08/01/2015	Awaiting Ac	-		staple unit for rental on current contract	NDR	New Deal Rental			
00.51	te Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
on ar		E CN0000109	Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair			
		E CN0000125	Derton / Technologies	06/03/2015		Carolina Su		test	REP	Repair			
		E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service			
		E CN0000135	Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR.	Select Call Type			
		Count: 38											
		Count: 3e	1										

• Click on the row selector of the call you would like to work with.

Home Equips	ment / Locations Co	ntract Finance / HR I	inventory Maint				ersion 2.5.1.4 - v2514 Example Company curement Sales Service Reporting U	tities				8
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ter text to search P		CustomerName	CalDate	CallState	Technician	CalTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	
unctions	Y +D:	(D:		10:	10:	(D:	4D:	(D:	(D:	10:	×D:	
anceons	E CN0000040	Westwood Dynamic	40 21/07/2014				Service machine S/N: 1912-102036	SERV	Service			
	CN0000042	Samanthas Diner	40 21/07/2014				Machine repair needed	REP	Repair			
	E CN0000044	Office Supplies Unlimited	44 28/07/2014				1 black toner for collection	TON	Toner Required			
	► E CN0000047	Titan Group	47 31/07/2014		George Jam		Service required	SERV	Service			_
Work In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014				Toner for delivery	TON	Toner Required			
nore an riogress		Titan Group	57 07/08/2014				Toner required	TON	Toner Required			
	E CN0000056	Young Electric	58 07/08/2014				Contract Closure - CO0000021	DR	Select Call Type			
Notes		Westwood Dynamic	59 08/08/2014				Deliver full set of toners	TON	Toner Required			
Notes		Samanthas Diner	60 08/08/2014				New machine	NDS	New Deal Sale			
		Westwood Dynamic	62 08/08/2014		Wesley Har.		Machine Rental Deal	NDR	New Deal Rental			
	E CN0000063	Young Electric	65 20/08/2014			. 12:26:58	Machine service required	SERV	Service			
Assignments 1		Danny Storm IT Cafe	69 23/09/2014				Test BPO fin tran	NDS	New Deal Sale			
	E CN0000069	Danny Storm IT Cafe	71 23/09/2014		Daniel Balgo.		Toner for delivery	TON	Toner Required			
	E CN0000070	Derton / Technologies	72 23/09/2014				Service machine	SERV	Service			
Hold History	E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac	Karlien Jessi.	11:04:32	Machine service required	SERV	Service			
		Derton / Technologies	75 25/09/2014	Awaiting Ac	Karlien Jessi.	11:41:18	test	NDS	New Deal Sale			
	E CN0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac	Karlien Jessi.	12:07:35	Service and toner required	SERV	Service			
		Titan Group	86 11/11/2014	Awaiting Ac	George Jam.	16:17:59	Magenta toner required	TON	Toner Required			
	E CN0000085	Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam.	. 16:21:59	CO789	NDS	New Deal Sale			
		Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
on and ano	E CN0000109	Titan Group	26/02/2015	Awaiting Ac	Carolina Su	. 09:52:00	Test machine	REP	Repair			
	E CN0000125	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	. 09:37:02	test	REP	Repair			
For Overland	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service			
	E CN0000135	Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
	Count: 38											
	Count: 38											
										1/2024 Version : 2.5		

ORDERS

• Click on the **Orders** tile.



Call Administration - Call Sales Orders

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er text to search ,P	CalReference	+ CustomerName	CalDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	
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	E CN0001036	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Belinda Sha	10:40:51	Copier service required.	SERV	Service			
On Site Info	▶ E CN0001035	Hope Works (Pty) Ltd	12/12/2023	UnAssigned		10:38:38	Paper keeps jamming.	REP	Repair			
	E CN0001034	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Bianca Du T	. 10:29:04	Full set of toners required	TON	Toner Required			
		Young Electric	05/12/2023	UnAssigned		15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale			
For Contract	CN0001032			UnAssigned			Test credit note on work order	MN	Manufacturing			
		Hope Works (Pty) Ltd	29/09/2023	UnAssigned		12:56:41	New Deal created from order OR0000306	NDS	New Deal Sale			
	E CN0001024	Hope Works (Pty) Ltd	12/09/2023	UnAssigned		09:23:50	Contract for Expiry Test	NDR	New Deal Rental			
Time Review		Derton / Technologies	08/09/2023	UnAssigned		10:52:25	Open warranty claims have not been processed.	INSP	Inspection			
	E CN0001022	Derton / Technologies	08/09/2023	UnAssigned		10:44:45	Meters attached with no readings captured	INST	Installation			
	E CN0001017	Derton / Technologies	07/09/2023	UnAssigned		16:43:14	Call Exceptions - to correct but not flag.	INST	Installation			
	E CN0001015	Hope Works (Pty) Ltd	05/09/2023	Awaiting Ac	Bianca Du T	. 15:56:53	Test call sla functionality	SERV	Service			
	FE CN0001014	Annie Juice Inc	22/08/2023	UnAssigned		11:30:52	Contract Closure - CO0000086	TR	Training			
4		Copiers	22/08/2023	UnAssigned		11:28:32	Contract Closure - CO0000041	DR	Select Call Type			
Orders		Electric	22/08/2023	UnAssigned		11:28:26	Contract Closure - CO0000031	DR	Select Call Type			
0		g Shoes	22/08/2023	UnAssigned		11:28:18	Contract Closure - PC0000001	DR	Select Call Type			
Ĩ.		Electric	22/08/2023	UnAssigned		11:27:49	Contract Closure - CO0000008	DR	Select Call Type			
		Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type			
or		Juice Inc	25/07/2023	UnAssigned		10:18:33	Machine inspection required	INSP	Inspection			
		Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac	Bianca Du T	. 11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	
	E CN0001005	Hope Works (Pty) Ltd	07/06/2023	UnAssigned		10:14:52	Walls require repainting	SM	Scheduled Maintenance	SERV	Services	
		Young Electric	13/12/2022	Awaiting Ac	Arin Milton	10:09:10	Test account balances	DR	Select Call Type			
Invoices	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Ac	Mary Thom	16:18:30	Test call for account balances manual.	DR.	Select Call Type			
		Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	PR	Parts Requirement			
		Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
Credit Notes		Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	ADM	Administration			
	Count: 37											

• The **Orders** listing screen will open displaying the Orders related to the selected call.

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For a detailed handling of this topic refer to Calls - Sales Order

Related Topics

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- Service Introduction to Call Administration
- Call Administration Edit a Call
- Call Administration My Calls
- Call Administration Assign a Call
- Call Administration Start or End Work
- Call Administration Close a Call
- Call Administration Complete a Call
- Call Administration Hold a Call
- Call Administration Pend a Call
- Call Administration Release a Call
- Call Administration Reinstate a Call

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