

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

SERVICE

CALL ADMINISTRATION - CALL SALES CREDIT NOTES

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

The **Credit Notes** tile is a quick way to navigate to the list of Credit Notes 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.



Call Administration - Call Sales Credit Notes

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runcus	0113	E CN0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac	-		Service machine S/N: 1912-102036	SERV	Service	-	-	
	Orders 1	E CN0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac			Machine repair needed	REP	Repair			
		E CN0000044	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			Service required	SERV	Service			
Work	In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac			Toner for delivery	TON	Toner Required			
		E CN0000055	Titan Group	57 07/08/2014	Awaiting Ac			Toner required	TON	Toner Required			
		E CN0000056	Young Electric	58 07/08/2014	Awaiting Ac			Contract Closure - CO000021	DR	Select Call Type			
		E CN0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac			Deliver full set of toners	TON	Toner Required			
Notes	Notes	E CN0000058	Samanthas Diner	60 08/08/2014				New machine	NDS	New Deal Sale			
		E CN0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac			Machine Rental Deal	NDR	New Deal Rental			
		E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac	Wesley Har	12:26:58	Machine service required	SERV	Service			
Assign	nments 2	CN0000067	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	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			
		E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac			Service machine	SERV	Service			
	listory	E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac			Machine service required	SERV	Service			
		CN0000073	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			
	ng History	E CN0000084	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			
		E CN0000094	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 Sit	te Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
		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			
Ere Co	ontract	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service			
	ontract	E CN0000135	Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
		Count: 38	11										

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

-			inventory Maint	tenance / Project	ts Manufac	turing Proc	ersion 2.5.1.4 - v2514 Example Company surement Sales Service Reporting Utili	ties				8
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ter text to search P	CalReference	CustomerName	CalDate	CallState	Technician	CalTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	
unctions	Y 10:	10:	-	×0:	10:	(D):	104	10:	0	-0:	×0:	
	E CN0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac	Belinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service			
	E CN0000042	Samanthas Diner	42 21/07/2014				Machine repair needed	REP	Repair			
	E CN0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			
	▶ E CN0000047	Titan Group	47 31/07/2014	Awaiting Ac	George Jam	14:13:49	Service required	SERV	Service			
Work In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			
		Titan Group	57 07/08/2014	Awaiting Ac	Belinda Sha	12:14:38	Toner required	TON	Toner Required			
	E CN0000056	Young Electric	58 07/08/2014	Awaiting Ac	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
Notes		Westwood Dynamic	59 08/08/2014	Awaiting Ac	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			
		Samanthas Diner	60 08/08/2014	Awaiting Ac	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
		Westwood Dynamic	62 08/08/2014	Awaiting Ac	Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
	E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac	Wesley Har	12:26:58	Machine service required	SERV	Service			
Assignments 1	CN0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac	Daniel Balgo	. 11:23:30	Test BPO fin tran	NDS	New Deal Sale			
	E CN0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac	Daniel Balgo	. 13:16:20	Toner for delivery	TON	Toner Required			
	E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac	Daniel Balgo	. 13:45:10	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			
	CN0000073	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			
	E CN0000084	Titan Group	86 11/11/2014	Awaiting Ac	George Jam	. 16:17:59	Magenta toner required	TON	Toner Required			
		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			
	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 Contract	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											

CREDIT NOTES

• Click on the Credit Notes tile.



Call Administration - Call Sales Credit Notes

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er text to search	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	▶	Hope Works (Pty) Ltd	12/12/2023	UnAssigned		10:38:38	Paper keeps jamming.	REP	Repair			
		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			
	CN0001032	Young Electric		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			
	⊞ CN0001024	Hope Works (Pty) Ltd	12/09/2023	UnAssigned		09:23:50	Contract for Expiry Test	NDR	New Deal Rental			
Time Review	E CN0001023	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			
		Derton / Technologies	07/09/2023	UnAssigned		16:43:14	Call Exceptions - to correct but not flag.	INST	Installation			
		Hope Works (Pty) Ltd	05/09/2023	Awaiting Ac	Bianca Du T.	. 15:56:53	Test call sla functionality	SERV	Service			
		Apple Juice Inc	22/08/2023	UnAssigned		11:30:52	Contract Closure - CO0000086	TR	Training			
ransactions	⊞ CN0001012	Panda Copiers	22/08/2023	UnAssigned		11:28:32	Contract Closure - CO0000041	DR.	Select Call Type			
ansaccions	⊞ CN0001011	Young Electric	22/08/2023	UnAssigned		11:28:26	Contract Closure - CO0000031	DR.	Select Call Type			
Quotes	⊞ CN0001010	Dancing Shoes	22/08/202	UnAssigned		11:28:18	Contract Closure - PC0000001	DR	Select Call Type			
	⊞ CN0001009	Young Electric	22/08/2023	UnAssigned		11:27:49	Contract Closure - CO000008	DR.	Select Call Type			
	⊞ CN0001008	Office Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type			
Orders	CN0001007	Apple Juice Inc	25/07/202	UnAssigned		10:18:33	Machine inspection required	INSP	Inspection			
Union		Norks (Pty) Ltd	07/06/2023	Awaiting Ac	Bianca Du T.	. 11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	
/ Credit N	later	Norks (Pty) Ltd	07/06/2023	UnAssigned		10:14:52	Walls require repainting	SM	Scheduled Maintenance	SERV	Services	
Creater	IULES	Electric	13/12/2023	Awaiting Ac	Arin Milton	10:09:10	Test account balances	DR	Select Call Type			
In		thas Diner	12/12/2023	Awaiting Ac	Mary Thom	16:18:30	Test call for account balances manual.	DR.	Select Call Type			
		Electric	29/11/2023	UnAssigned		11:29:19	Order the same part twice receive with different batch num	PR	Parts Requirement			
-		Norks (Pty) Ltd	31/10/2023	2 UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
cytanines	E 00000331	Juice Inc	24/10/2023	! UnAssigned		16:38:15	Contract Closure - CO0000054	ADM	Administration			
	Count: 37											

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

3 ¥											- BPO:	Version 2.5.1.4 - v2	514 Example	e Compan	r						- 8
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For a detailed handling of this topic refer to Calls - Add a Credit Note

Related Topics



- 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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