(missing or bad snippet)

SERVICE

CALLS – THE EDIT BUTTONS

When a call is saved, BPO automatically generates a Work Order for the call that holds all the information logged against the call.

If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can update the details <u>directly</u> in the call screen, by clicking on the **Edit [...] (ellipsis)** buttons in the relevant fields.

Ribbon Access: Service > Calls
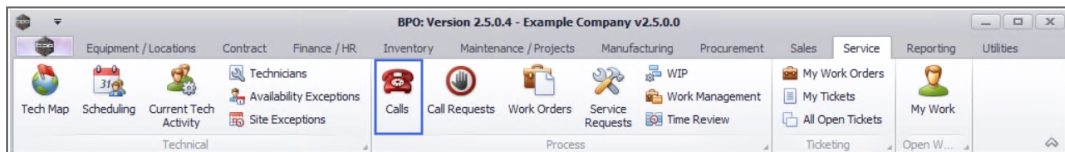
1. The **Call Listing** screen will be displayed.
2. Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
3. The **Work Order data grid** will be **expanded** to display the generated **work order number** and all the information for the call log.
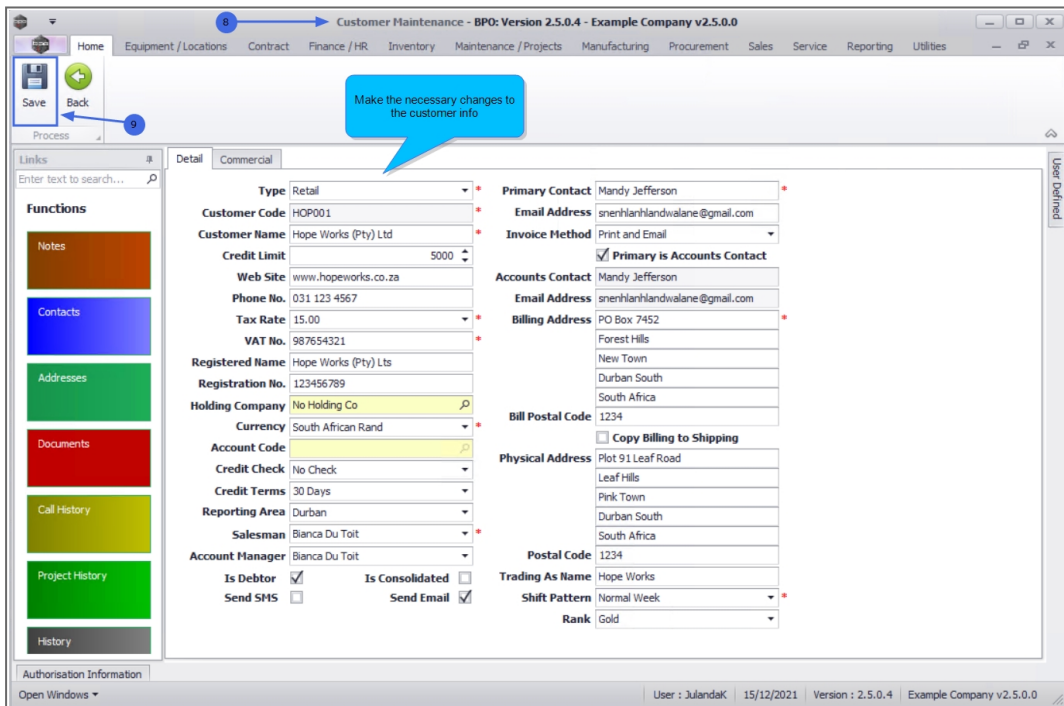4. Click in the **row** of the Work Order you wish to edit.
5. Click on **Edit**.
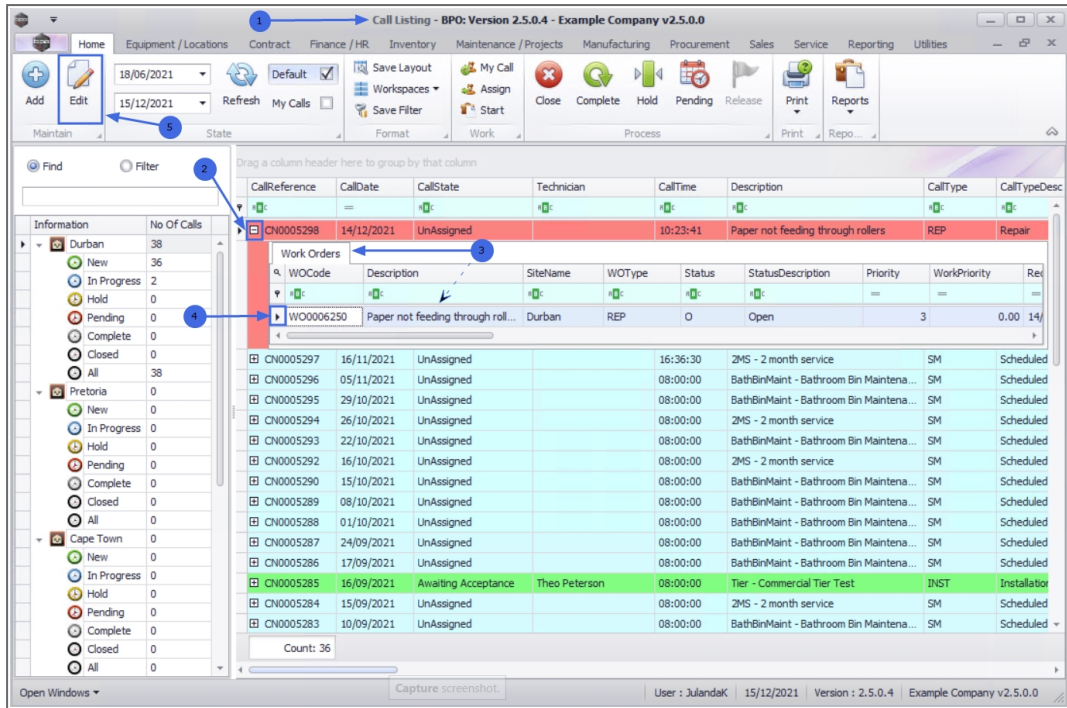
6. The **Call maintenance** screen will be displayed.

EDIT CUSTOMER INFO

7. Click on the **Edit [...] (ellipsis)** button in the **Customer** field.
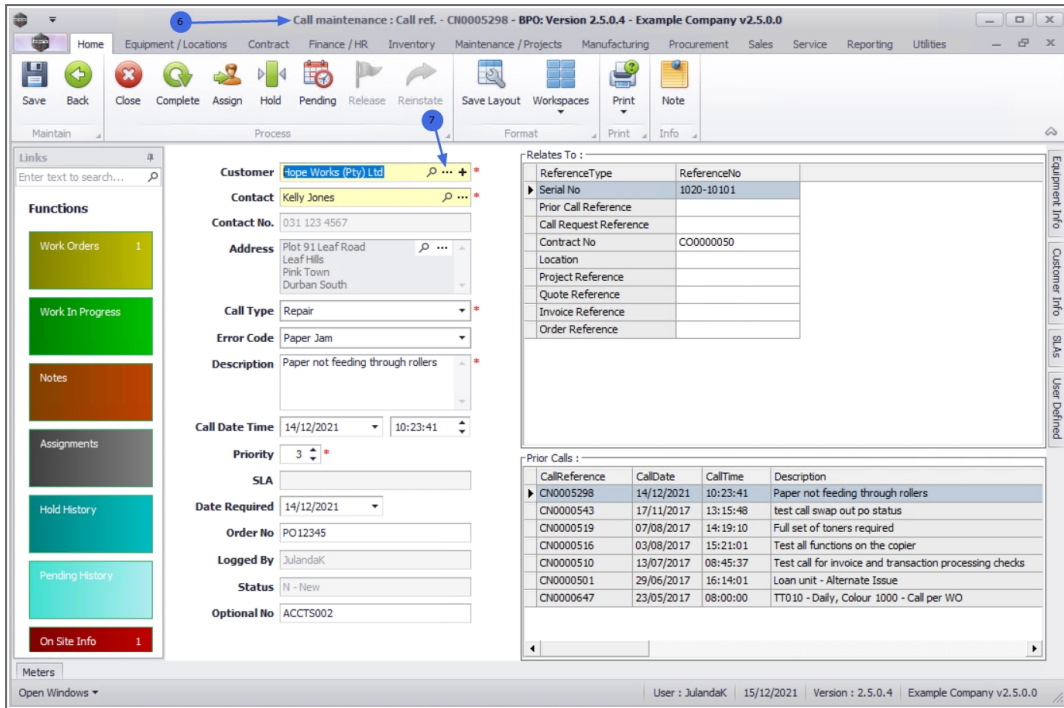
8. The **Customer Maintenance** screen will be displayed.
9. Edit the details for the customer and click on **Save** to return to the **Call maintenance** screen.

ADD NEW CONTACT

When you are initially selecting the contact for the call log in the Call Maintenance screen, it may be that your contact is <u>not</u> listed. You can **add** a new contact <u>directly</u> from the Call maintenance screen.
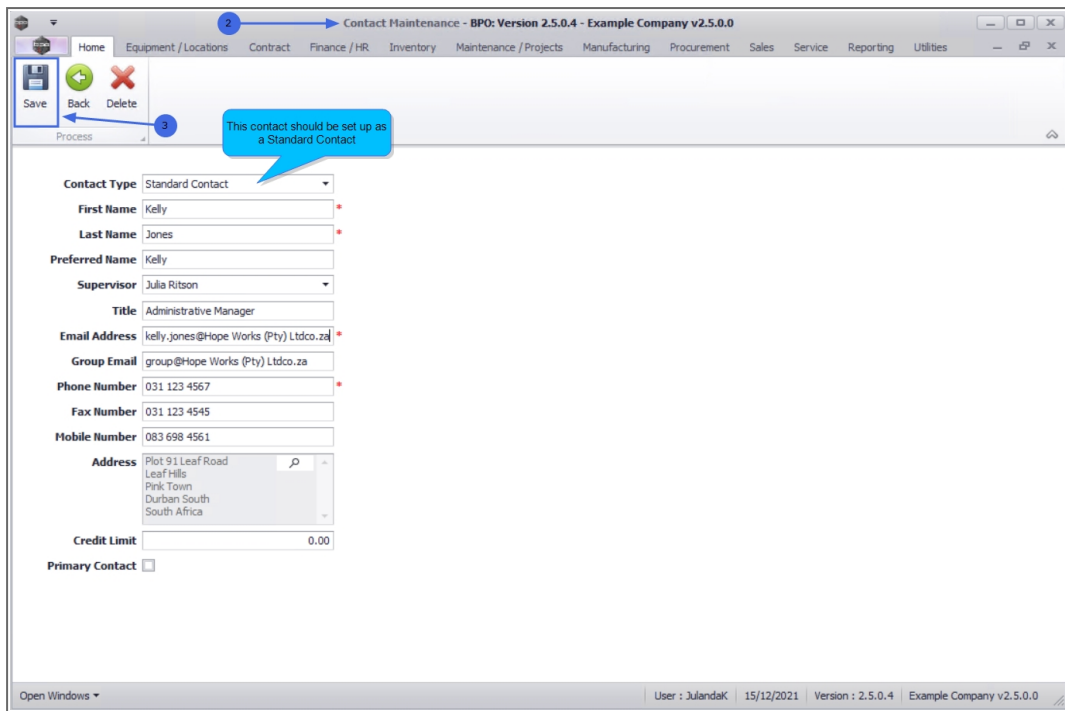
> **Note** that this contact should be set up as a **Standard Contact**. For additional help with this process, refer to Calls - Add New Contact.

1. Click on the **Edit [...] (ellipsis)** button in the **Contact** field.

2. "The Contact Maintenance screen will be displayed." on page 3
3. Add the contact details as required and click on **Save**.

4. You will return to the **Call maintenance** screen.

5. When you receive the **Contact Processing** message to confirm that;

  • **Contact maintenance for customer : [**customer code**] complete.**

6. Click on **OK**.

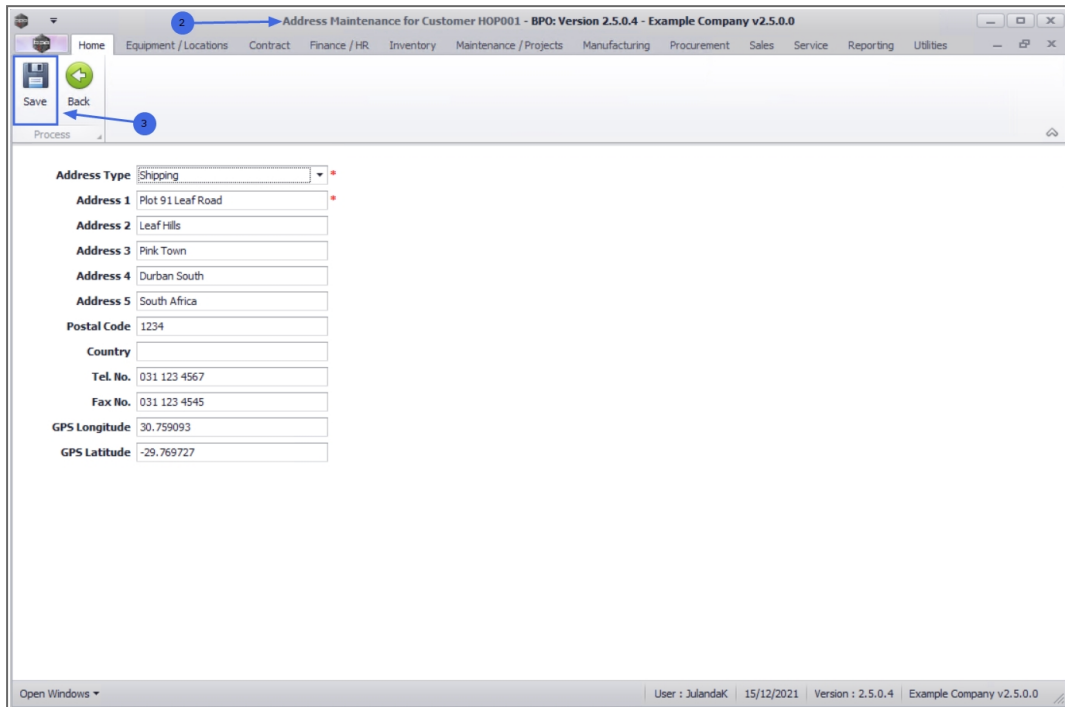7. The new contact will now be available when you use the **search** button in the Contact field.

Calls - Edit Buttons
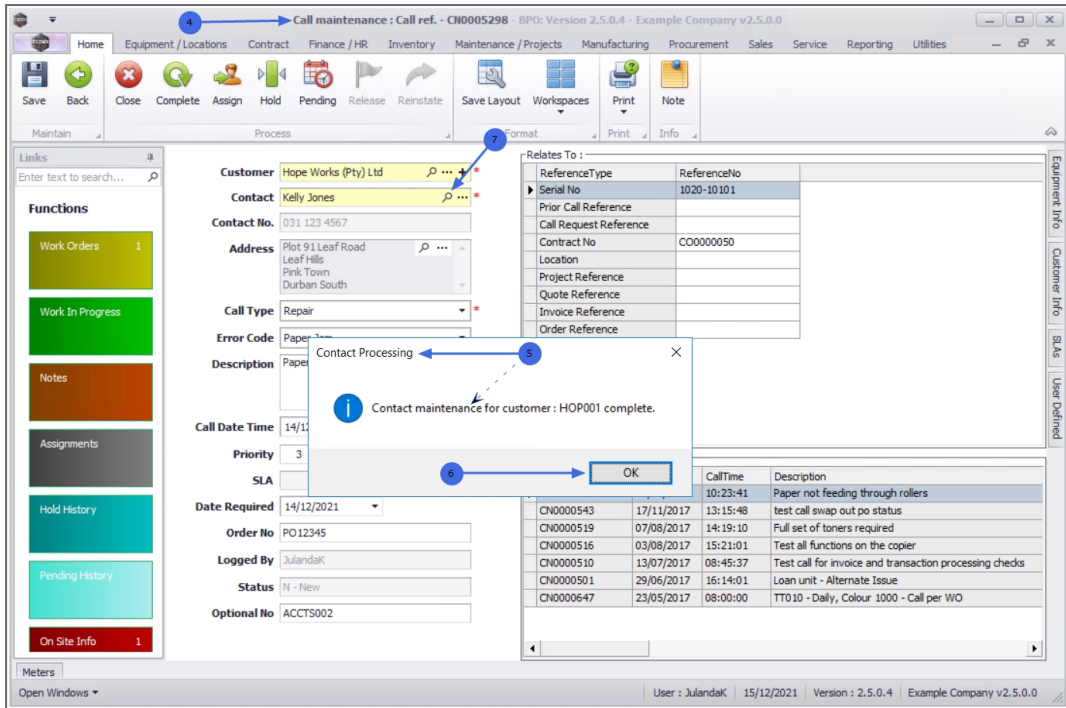
EDIT CUSTOMER ADDRESS

1. Click on the **Edit [...] (ellipsis)** button in the **Address** field.
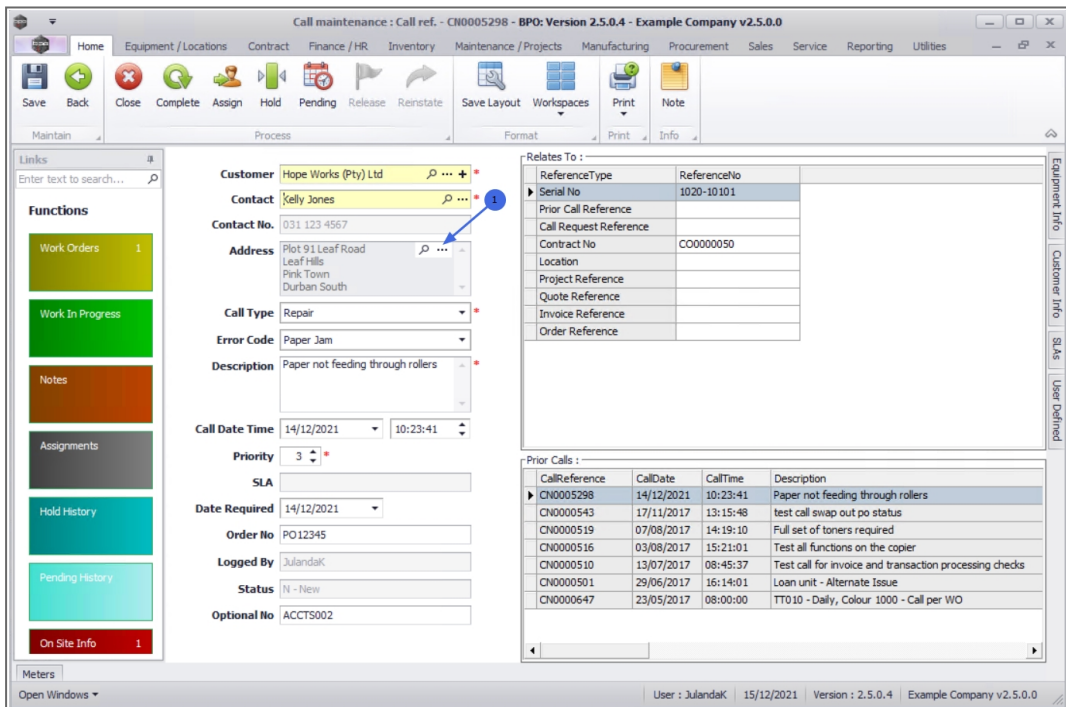
2. The **Address Maintenance for Customer** screen will be displayed.
3. Make the necessary changes to the address as required, then click on **Save**.

4. You will return to the **Call maintenance** screen.
5. When you receive the **Address Processing** message to confirm that;
    - **The address: [**customer address**] for customer has been saved.**
6. Click on **OK**.

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