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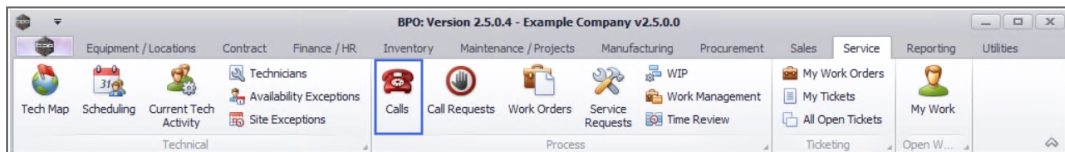
SERVICE

CALLS – THE EDIT BUTTONS

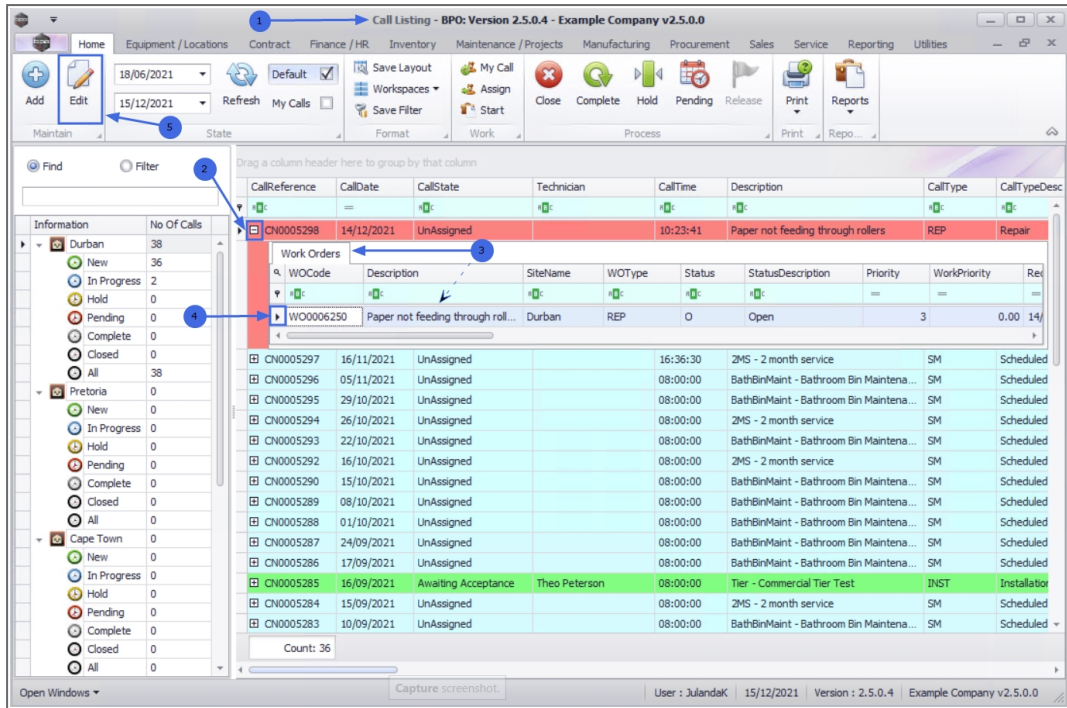
When a call is saved, BPO automatically generates a Work Order for the call that holds all the information logged against the call.

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

Ribbon Access: Service > Calls



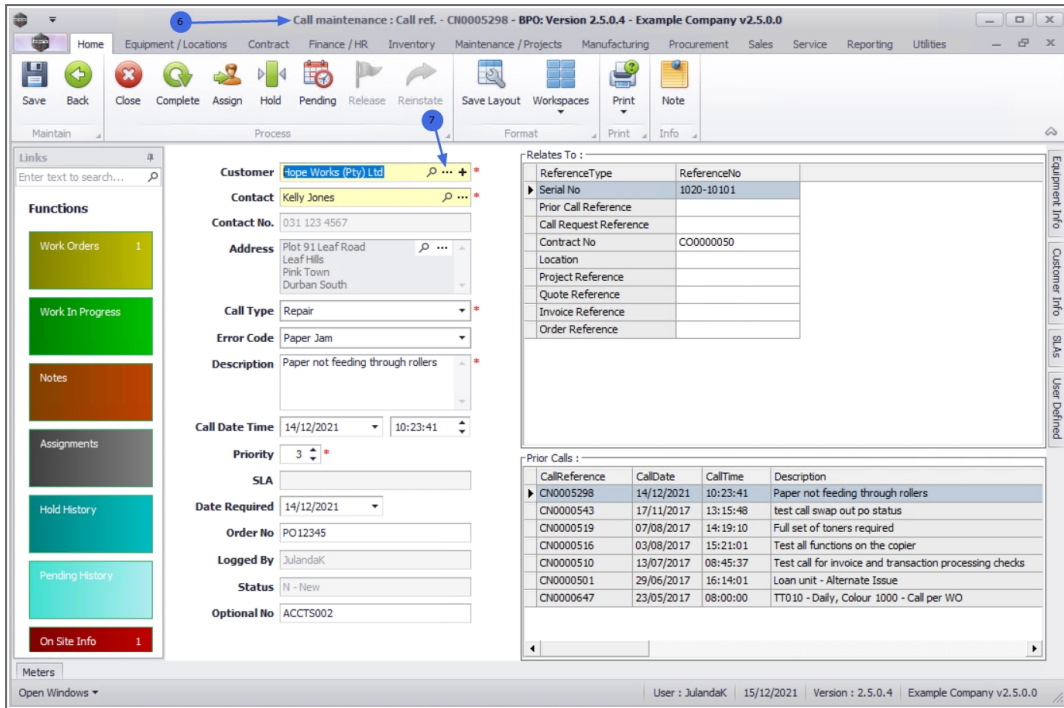
1. The **Call Listing** screen will be displayed.
2. Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
3. The **Work Order data grid** will be **expanded** to display the generated **work order number** and all the information for the call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



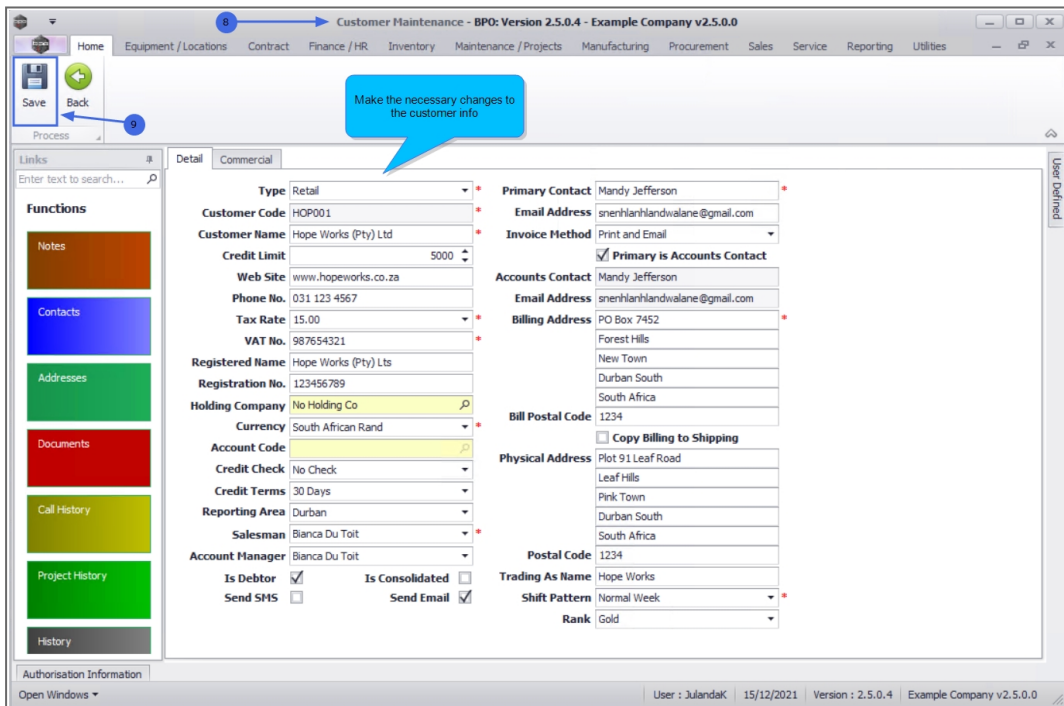
6. The **Call maintenance** screen will be displayed.

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 not listed. You can **add** a new contact directly from the Call maintenance screen.

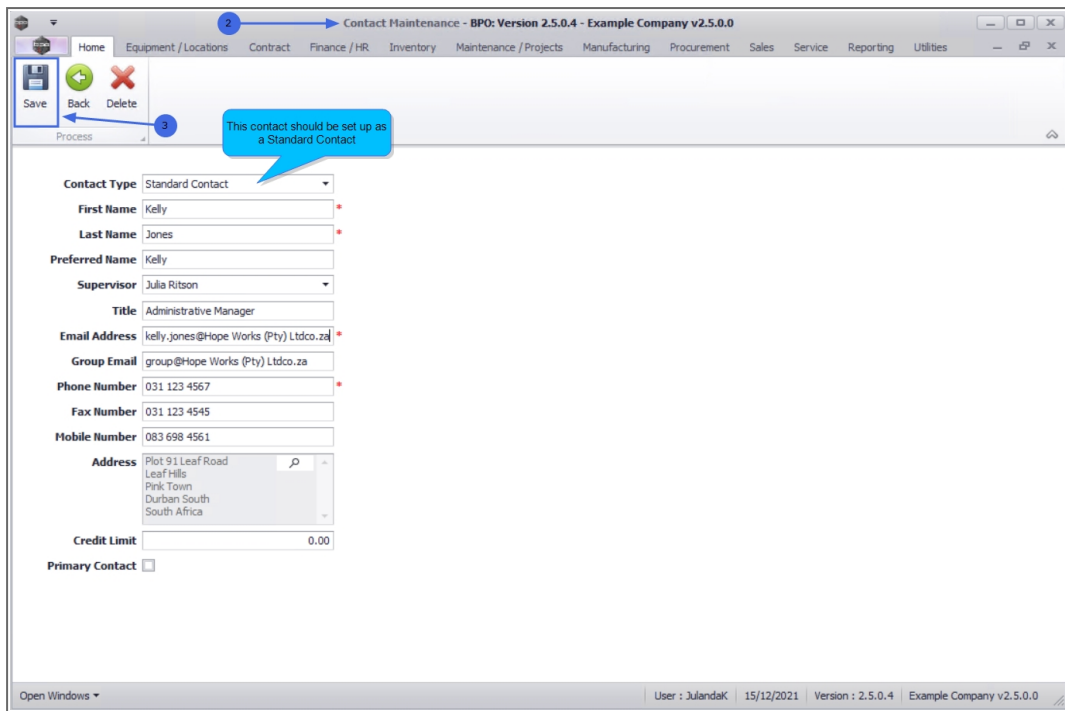


Note that this contact should be set up as a Standard Contact. For additional help with this process, refer to [Calls - Add New Contact](#).

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

The screenshot shows the 'Call maintenance' window for a specific call reference. The 'Contact' field is highlighted in yellow, and a blue circle with an arrow points to the edit button (three dots) next to it. The interface includes a top navigation bar, a toolbar with various actions like Save, Back, Close, Complete, Assign, Hold, Pending, Release, Reinststate, Save Layout, Workspaces, Print, and Note. The main area is divided into several sections: a left sidebar with 'Functions' (Work Orders, Work In Progress, Notes, Assignments, Hold History, Pending History, On Site Info), a central form for 'Customer', 'Contact', 'Contact No.', 'Address', 'Call Type', 'Error Code', 'Description', 'Call Date Time', 'Priority', 'SLA', 'Date Required', 'Order No.', 'Logged By', 'Status', and 'Optional No.', and a right sidebar with 'Relates To' and 'Prior Calls' tables. The 'Relates To' table shows relationships between call references, and the 'Prior Calls' table shows a list of previous calls with columns for CallReference, CallDate, CallTime, and Description.

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

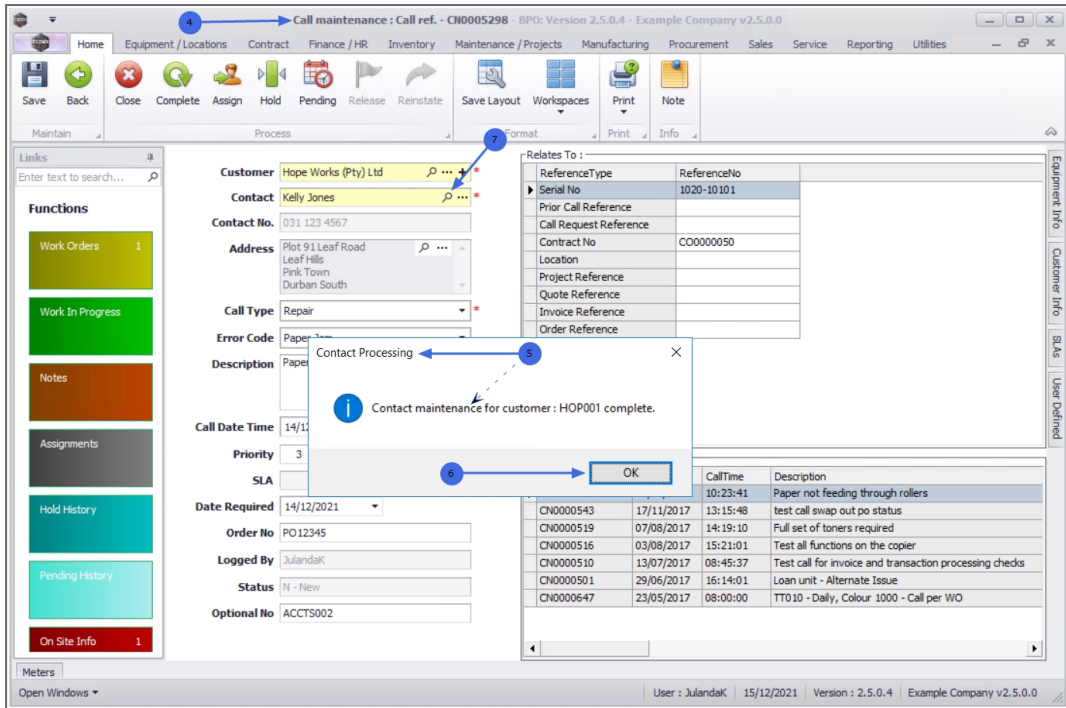


The screenshot shows the 'Contact Maintenance' form in the CO3 software. The form is titled 'Contact Maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0'. The form includes the following fields:

- Contact Type:** Standard Contact (dropdown menu)
- First Name:** Kelly
- Last Name:** Jones
- Preferred Name:** Kelly
- Supervisor:** Julia Ritson
- Title:** Administrative Manager
- Email Address:** kelly.jones@Hope Works (Pty) Ltdco.za
- Group Email:** group@Hope Works (Pty) Ltdco.za
- Phone Number:** 031 123 4567
- Fax Number:** 031 123 4545
- Mobile Number:** 083 698 4561
- Address:** Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South, South Africa
- Credit Limit:** 0.00
- Primary Contact:**

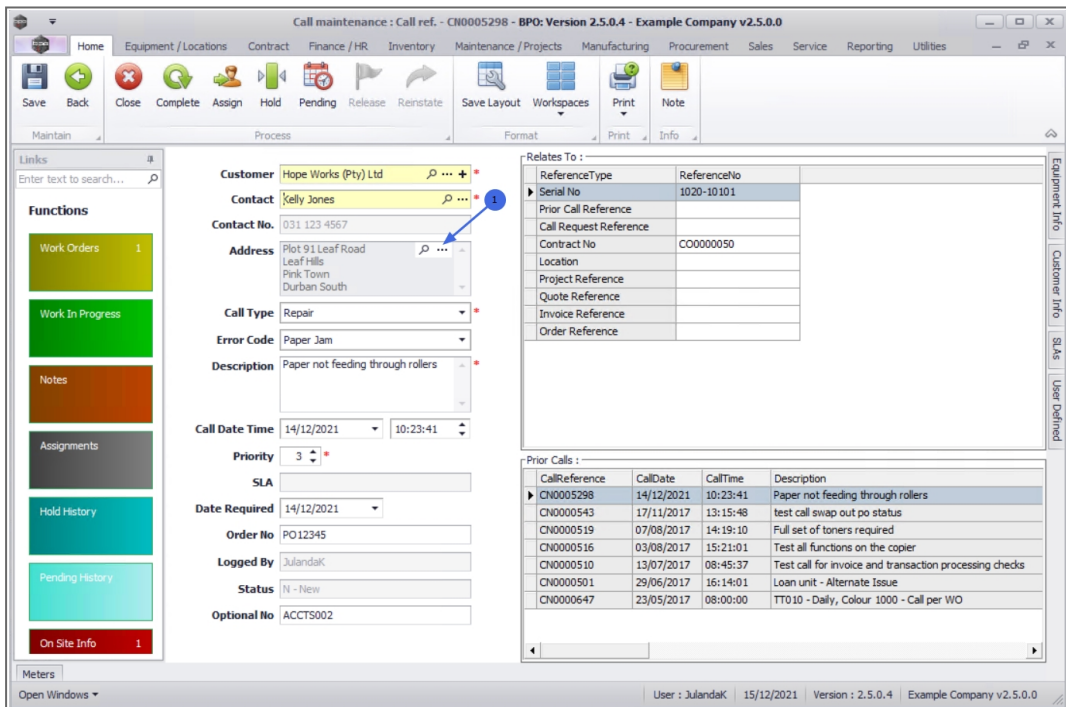
A blue callout box points to the 'Contact Type' dropdown, stating: "This contact should be set up as a Standard Contact". The 'Save', 'Back', and 'Delete' buttons are visible in the top left corner of the form.

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.

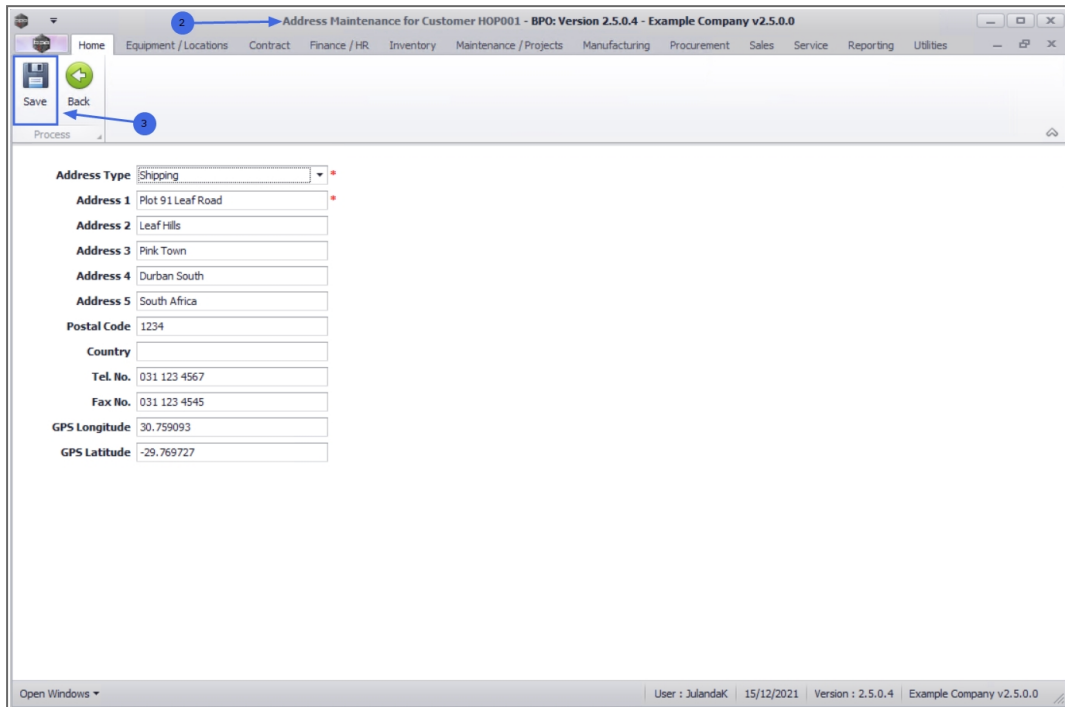


EDIT CUSTOMER ADDRESS

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**.

The screenshot displays the 'Call maintenance' window for call reference CN0005298. The interface includes a top navigation bar with various modules like Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar below the navigation bar contains buttons for Save, Back, Close, Complete, Assign, Hold, Pending, Release, Reinstate, Save Layout, Workspaces, Print, and Note.

The main content area is divided into several sections:

- Links:** A search bar for links.
- Functions:** A vertical list of function buttons: Work Orders (1), Work In Progress, Notes, Assignments, Hold History, Pending History, and On Site Info (1).
- Customer Information:**
 - Customer: Hope Works (Pty) Ltd
 - Contact: Kelly Jones
 - Contact No.: 031 123 4567
 - Address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South
 - Call Type: Repair
 - Error Code: Address Processing
 - Description: Address Processing
 - Call Date Time: [Blank]
 - Priority: [Blank]
 - SLA: [Blank]
 - Date Required: 14/12/2021
 - Order No: PO12345
 - Logged By: JulandaK
 - Status: N - New
 - Optional No: ACCTS002
- Relates To:** A table listing related records:

ReferenceType	ReferenceNo
Serial No	1020-10101
Prior Call Reference	
Call Request Reference	
Contract No	CO0000050
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	
- Call History Table:**

ReferenceNo	Date	Time	Description
CN0000543	17/11/2017	13:15:48	test call swap out po status
CN0000519	07/08/2017	14:19:10	Full set of toners required
CN0000516	03/08/2017	15:21:01	Test all functions on the copier
CN0000510	13/07/2017	08:45:37	Test call for invoice and transaction processing checks
CN0000501	29/06/2017	16:14:01	Loan unit - Alternate Issue
CN0000647	23/05/2017	08:00:00	TT010 - Daily, Colour 1000 - Call per WO

An 'Address Processing' dialog box is open in the center, displaying the message: 'The address : Plot 91 Leaf Road for customer HOP001 has been saved.' The dialog has an 'OK' button. Blue arrows with numbers 4, 5, and 6 point to the 'Address Processing' button in the main form, the dialog box, and the 'OK' button respectively.

The status bar at the bottom shows: User : JulandaK, 15/12/2021, Version : 2.5.0.4, Example Company v2.5.0.0.

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