

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

## SERVICE

### INTRODUCTION TO MY WORK

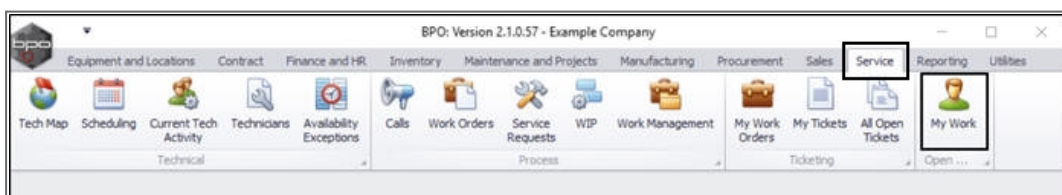
The **My Work** screen deals with work that is assigned to a **specific** employee, i.e. when I am logged in, I can only see work orders assigned to me.

This screen is very much like the call screen in that you can request parts, services and loan units; book time, travel and expenses; as well as view customer and machine detail (including warranty information).

This screen can be used by:

- a technician who does not use Tech Connect, but has access to BPO in order to log his own part requests and book his time, etc.
- anyone assigned to the work order, where a call does not exist, e.g. a work order was created to repair a machine in the workshop.

**Ribbon Access:** Service > My Work



### THE MY WORK LISTING SCREEN

- The **My Work** Listing screen will be displayed.
- This screen lists all **open** and completed work orders assigned to the current user logged in to the system.

## THE WORK ORDERS FRAME

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- Click on this tab to view a list of all **work orders** assigned to the user logged in.

The screenshot displays the 'My Work - BPO: Version 2.1.0.57 - Example Company' application window. The interface includes a top navigation bar with tabs for Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a ribbon menu with various action buttons such as Add, Edit, Complete, Start, Save Layout, Workspaces, Print Call Report, Print WO, Service History, Project Progress, View Customer, Export, and Refresh. The main content area is titled 'Work Orders' and 'Work Requests'. It features a table with the following columns: WCode, WCodeDescription, SiteName, Status, WOType, WOTypeDesc, OriginRef, OriginDesc, OriginType, CustomerCode, and Custom. The table contains four rows of data:

WCode	WCodeDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	Custom
WO0001592	RSI V1.27.0.0 - Issue - Part Category mainten...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope W
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing					
WO0001662	Machine service required	Durban	O	SERV						
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs					

The interface also includes a status bar at the bottom with 'Open Windows' and a date '16 May 2018'.

## Prior Work Orders and Work Order Technicians Frames

- In the Work Orders frame, click on a work order that has a **bold** (active) expand button in front of its row.
  - **Note:** If the expand button is **bold** as opposed to **feint** then this indicates that there is hidden content.

My Work - BPO: Version 2.1.0.57 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

WCode	WDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	Custom
WO0001592	RSI V1.27.0.0 - Issue - Part Category mainten...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope W
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing					
WO0001662	Machine service required	Durban	O	SERV						
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs					

Open Windows 16 May 2018

The **Prior Work Orders** and **Work Order Technicians** frames will be expanded.

### **PRIOR WORK ORDERS**

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- Click on the **Prior Work Orders** tab to display a list of **prior work orders** for this serial number.

My Work - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

WOCODE	WODESCRIPTION	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	Sch
WO0001592	RSI V1.27.0.0 - Issue - Part Catego...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	19
WO0001616	Created for production batch - test2	Durban	O	MV	Manufacturing							28
WO0001662	Machine service required	Durban	O	SERV								15
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15

Prior Work Orders Work Order Technicians

SerialNo	WOType	WOTypeDesc	WOCODE	RequestDate	CompletionDate	CompletionTime	Description	AssignedTo	EmployeeName	Priority	Rectifica
19-12345	REP	Machine Repairs	WO0001663	15 May 2018	14 Jun 2018	00:00:00	Copier to be repaired	24	Abigail Mhine	2	
19-12345	DR	Default	WO0001593	19 Oct 2017	18 Nov 2017	12:00:00	Contract Closure - CO0000009	1	Bianca Du Toit	2	
19-12345	TEST	Testing	WO0001544	02 Aug 2017	01 Sep 2017	12:00:00	Warranty claim with parts only	6	George James ...	2	
19-12345	TON	Toner Required	WO0001543	02 Aug 2017	28 Nov 2017	12:02:02	Toner required for machine	6	George James ...	2	Work
19-12345	DR	Default	WO0001180	30 Mar 2017	30 Mar 2017	09:29:35	work order linked to an asset l...	17	Judith Mudzengi	2	Exper
19-12345	SM	Scheduled Maintenance	WO0001124	24 Feb 2017	24 Feb 2117	12:00:00	TT070 - 2 Daily - Call per WO	6	George James ...	2	
19-12345	SERV	Service	WO0000963	06 Oct 2016	15 Aug 2017	16:07:20	Call closure tests	1	Bianca Du Toit	2	dé sc
19-12345	TON	Toner Required	WO0000799	29 Mar 2016	08 Jun 2016	09:30:04	Cyan toner required	6	George James ...	2	work
19-12345	TON	Toner Required	WO0000783	22 Mar 2016	18 Apr 2016	13:31:15	Toner replacement	6	George James ...	1	work
19-12345	REP	Machine Repairs	WO0000468	06 Mar 2015	13 Aug 2015	15:11:14	test	1	Bianca Du Toit	2	test
19-12345	REP	Machine Repairs	WO0000469	06 Mar 2015	05 Apr 2015	12:00:00	test	6	George James ...	2	
19-12345	SERV	Service	WO0000470	06 Mar 2015	05 Apr 2015	12:00:00	test	1	Bianca Du Toit	2	
19-12345	SERV	Service	WO0000471	06 Mar 2015	05 Apr 2015	12:00:00	test	7	Carolina Suzzet...	2	

Open Windows 17 May 2018

## **WORK ORDER TECHNICIANS**

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- Click on the **Work Order Technicians** tab to display a list of **technicians** linked to this work order.



My Work - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Complete | Start | Save Layout | Workspaces | Print Call Report | Print WO | Service History | Project Progress | View Customer | Export | Refresh

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	Sch
WO0001592	RSI V1.27.0.0 - Issue - Part Catego...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	19
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing							28
WO0001662	Machine service required	Durban	O	SERV								15
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15

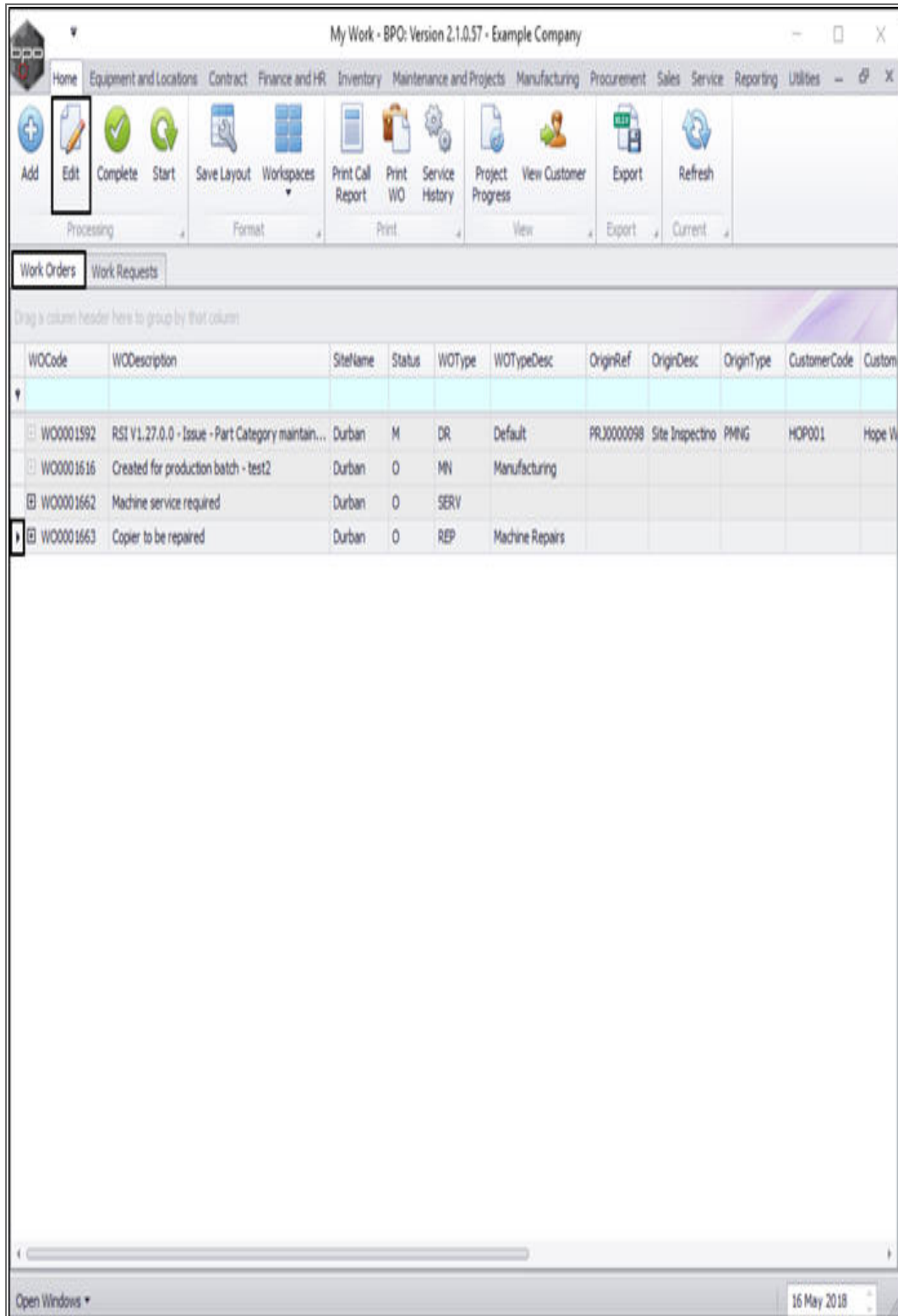
Prior Work Orders | Work Order Technicians

Open Windows | 17 May 2018

## VIEW WORK ORDER DETAILS

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- Making sure that you are in the **Work Orders** frame, click on the **row selector** in front of the **work order** that you wish to view the **details** of.
- Click on **Edit**.



The **Maintain WO - Ref [ ]** screen will be displayed. Here you can view:

1. The main work order details.
2. The call or project reference - if this work order is linked to a call or project.
3. Scheduling details.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Maintain Format Print

Links: Enter text to search...

Functions: Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses

**1**

Description: Copier to be repaired

Requestor: Abigail Mine

WO Type: Repair

Priority: 2

Request Date: 15 May 2018 10:40:28

Status: 0 - Open

Billable:

Capitalise:

Work Order Item

Functional Location: Equipment

Item: 19-12345

Comment:

**2**

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PRNG	Project Reference	

**3**

Schedule:

Assigned To: Abigail Mine

Assigned By: Abigail Mine

Scheduled Start: 15 May 2018 10:40:29

Scheduled End: 14 Jun 2018 00:00:00

Actual Start: 14 Jun 2018 00:00:00

Actual End: 14 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

Rectification Code:

Rectification Comments:

Completion Date: 14 Jun 2018 00:00:00

Meters

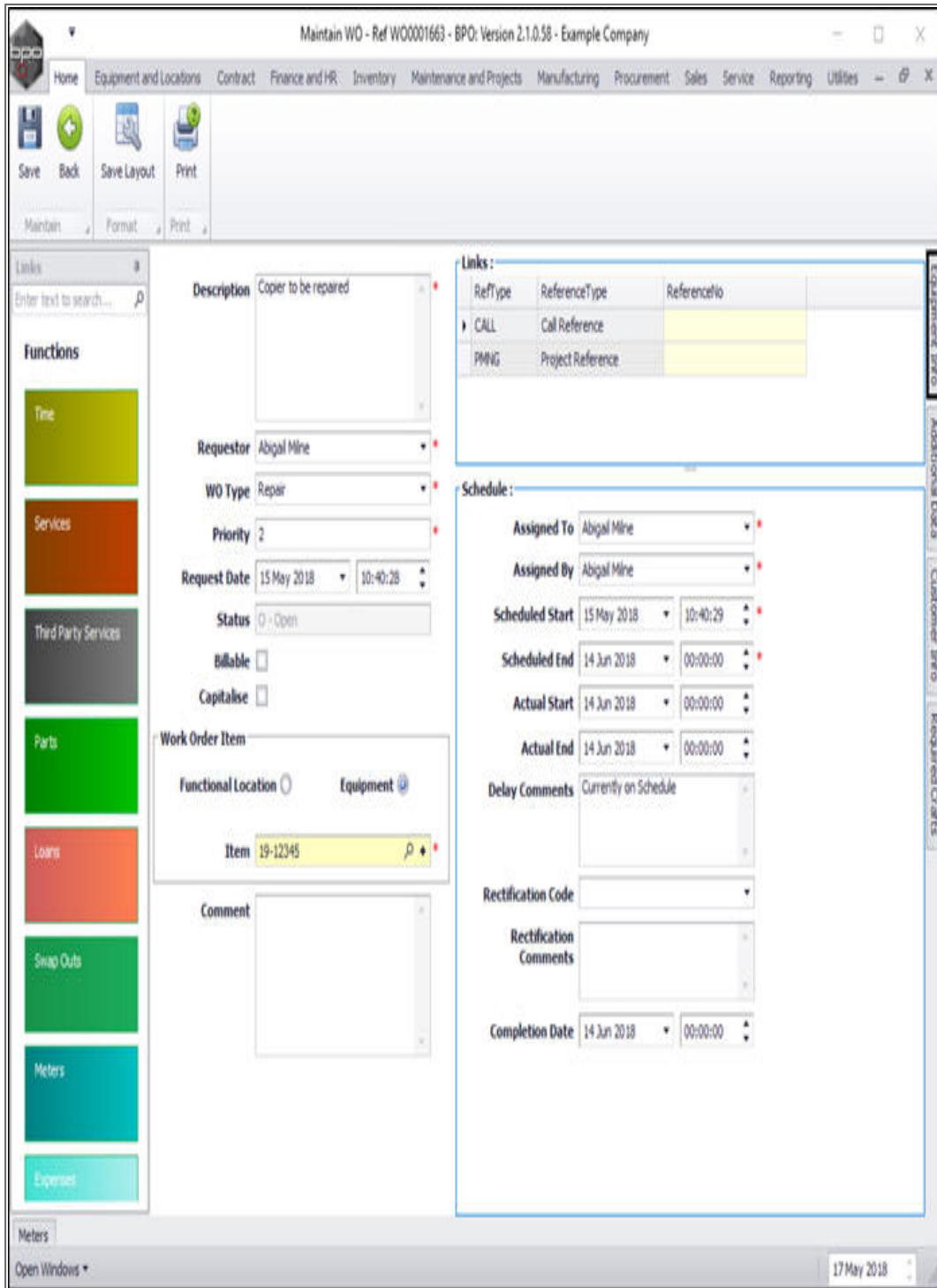
Open Windows

17 May 2018

## EQUIPMENT INFO

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- In the **Maintain WO - Ref [ ]** screen, click on the **Equipment Info** tab on the right side of the screen.



The **Equipment Info** docking panel will be expanded. Here you can view:

1. Equipment Information details (e.g. part no., model no.)
2. Warranty information
3. Equipment Notes

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' window. The interface includes a top navigation bar with various modules like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with Save, Back, Save Layout, and Print buttons.

The main content area is divided into several sections:

- Left Panel:** Contains 'Links' (search bar), 'Functions' (Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses), and 'Meters'.
- Form Fields:**
  - Description:** Copier to be repaired
  - Requestor:** Abigail Mine
  - WO Type:** Repair
  - Priority:** 2
  - Request Date:** 15 May 2018 10:40:28
  - Status:** Open
  - Billable:**
  - Capitalise:**
  - Work Order Item:** Functional Location: Equipment, Item: 19-12345
  - Comment:** (Empty text area)
- Equipment Info Panel:**
  - Part No:** SP1919
  - Part Desc:** SP1919 Sprint Colour MFC
  - Model No:** 1919
  - Category:** Hardware
- Warranties Table:**

WarrantyCode	Description	SupplierCode	SupplierName	StartDate
24MSW	24 Month Supplier Warranty	SPR001	Sprint Distributors Local	07 Apr 2014
- Equipment Notes Table:**

Comment	Date	FullName
	06 Mar 2015	Bianca Du Toit
	08 Apr 2014	Belinda Sherman

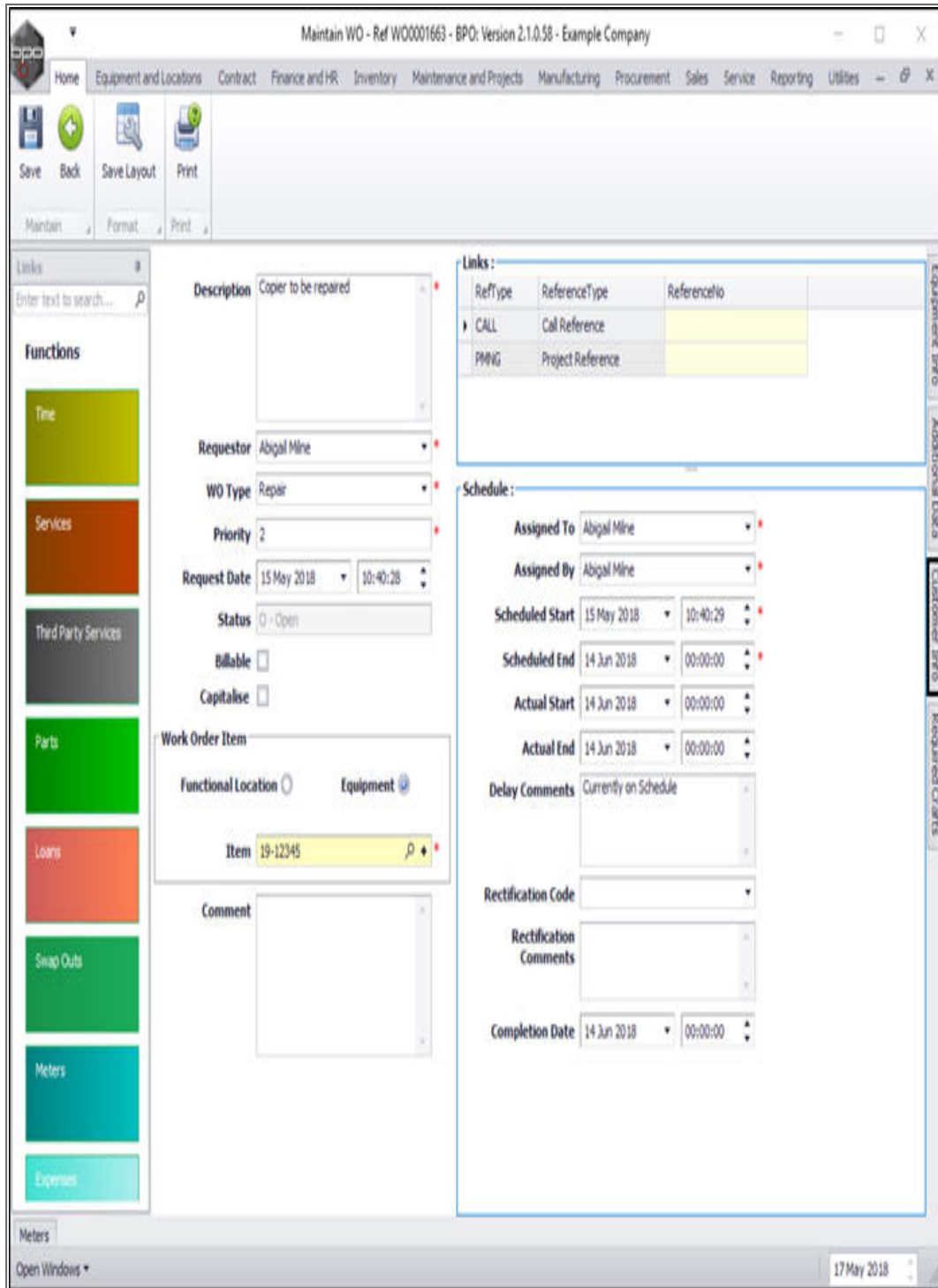
Red callout boxes with numbers 1, 2, and 3 are placed over the Equipment Info, Warranties table, and Equipment Notes table respectively.



## **CUSTOMER INFO**

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- In the **Maintain WO - Ref [ ]** screen, click on the **Customer Info** tab on the right side of the screen.



The **Customer Info** docking panel will be expanded.

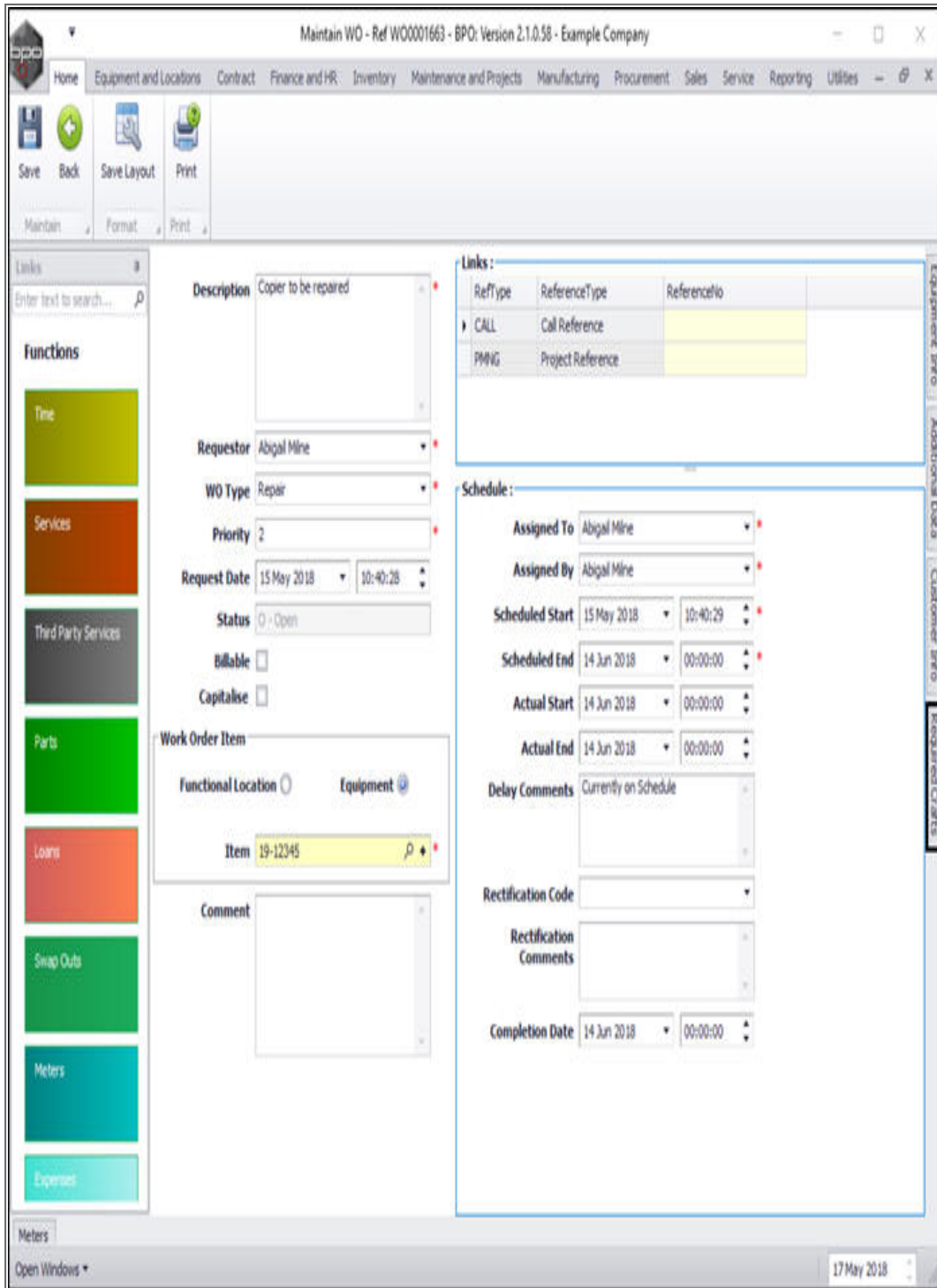
Here you can view:

1. Customer Information details (e.g. phone no., address).
2. Customer Notes

## REQUIRED CRAFTS

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- In the **Maintain WO - Ref [ ]** screen, click on the **Required Crafts** tab on the right side of the screen.



The **Required Crafts** docking panel will be expanded.

- Here you can view a list of the **crafts** and the corresponding **labour time** and **crew size** needed to complete this work order.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Links  
Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Meters

Open Windows

17 May 2018

Description: Copier to be repaired

Requestor: Abigal Mine

WO Type: Repair

Priority: 2

Request Date: 15 May 2018 10:40:28

Status: Open

Billable:

Capitalise:

Work Order Item

Functional Location: Equipment

Item: 19-12345

Comment

Required Crafts

CraftName	CraftDesc	EstLabourHours	CrewSize
ADMIN	Administration	1.00	1
TECH	Technician	2.00	1

## **ADDITIONAL DATA**

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- In the **Maintain WO - Ref [ ]** screen, click on the **Additional Data** tab on the right side of the screen.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Maintain Format Print

Links  
Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Looms

Swap Outs

Meters

Expenses

Meters  
Open Windows

17 May 2018

Description: Copier to be repaired

Requestor: Abigail Mine

WO Type: Repair

Priority: 2

Request Date: 15 May 2018 10:40:28

Status: Open

Bilable:

Capitalise:

Work Order Item

Functional Location: Equipment

Item: 19-12345

Comment

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	

Schedule:

Assigned To: Abigail Mine

Assigned By: Abigail Mine

Scheduled Start: 15 May 2018 10:40:29

Scheduled End: 14 Jun 2018 00:00:00

Actual Start: 14 Jun 2018 00:00:00

Actual End: 14 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

Rectification Code

Rectification Comments

Completion Date: 14 Jun 2018 00:00:00

Equipment Info  
Additional Data  
Customer Info  
Required Crafts

The **Additional Data** docking panel will be expanded.



- Here you can create **customised fields** of additional data pertinent to this work order if required.

The screenshot displays the 'Maintain WO' interface for a work order with reference 'WO0001663'. The window title is 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company'. The top navigation bar includes 'Home', 'Equipment and Locations', 'Contract', 'Finance and HR', 'Inventory', 'Maintenance and Projects', 'Manufacturing', 'Procurement', 'Sales', 'Service', 'Reporting', and 'Utilities'. Below the navigation bar are buttons for 'Save', 'Back', 'Save Layout', and 'Print'. A secondary row of buttons includes 'Maintain', 'Format', and 'Print'.

The main content area is divided into several sections:

- Links:** A search bar with the text 'Enter text to search...'.
- Functions:** A vertical list of colored buttons: 'Time' (yellow), 'Services' (orange), 'Third Party Services' (grey), 'Parts' (green), 'Loans' (red), 'Swap Outs' (teal), 'Meters' (blue), and 'Expenses' (light blue).
- Form Fields:**
  - Description:** A text box containing 'Copier to be repaired'.
  - Requestor:** A dropdown menu with 'Abigal Mine' selected.
  - WO Type:** A dropdown menu with 'Repair' selected.
  - Priority:** A text box with the value '2'.
  - Request Date:** A date and time selector showing '15 May 2018' and '10:40:28'.
  - Status:** A dropdown menu with 'Open' selected.
  - Billable:** A checkbox that is currently unchecked.
  - Capitalise:** A checkbox that is currently unchecked.
  - Work Order Item:** A section with two radio buttons: 'Functional Location' (unselected) and 'Equipment' (selected). Below them is an 'Item' dropdown menu with '19-12345' selected.
  - Comment:** A large text area for entering notes.
- Additional Data:** A section titled 'Custom Fields' containing ten input fields labeled 'Other1' through 'Other10', each with a placeholder text 'Field 1' through 'Field 10'.

On the right side of the form, there are three vertical tabs: 'Equipment Info', 'Customer Info', and 'Required Crafts'. At the bottom left, there is a 'Meters' button and an 'Open Windows' dropdown. At the bottom right, a date indicator shows '17 May 2018'.

## THE FUNCTIONS TILES

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On the left side of this **Maintain WO** screen is the **Links** docking panel. This panel contains tiles that direct you to more information linked to the selected work order.

### Time

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- In the **Maintain WO - Ref [ ]** screen, click on the **Time** tile.

The screenshot displays the 'Maintain WO' interface for a work order with reference WO0001663. The main window title is 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company'. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Save, Back, Save Layout, and Print. A left sidebar contains a 'Links' search box and a 'Functions' menu with buttons for Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The main content area is divided into several sections:

- Description:** Copier to be repaired
- Requestor:** Abigal Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:** Functional Location: Equipment, Item: 19-12345
- Comment:** (Empty text area)
- Links:** A table with columns RefType, ReferenceType, and ReferenceNo.
 

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
  - Assigned To: Abigal Mine
  - Assigned By: Abigal Mine
  - Scheduled Start: 15 May 2018 10:40:29
  - Scheduled End: 14 Jun 2018 00:00:00
  - Actual Start: 14 Jun 2018 00:00:00
  - Actual End: 14 Jun 2018 00:00:00
  - Delay Comments: Currently on Schedule
  - Rectification Code: (Empty dropdown)
  - Rectification Comments: (Empty text area)
  - Completion Date: 14 Jun 2018 00:00:00








At the bottom, there is a 'Meters' section and an 'Open Windows' dropdown. The system date is shown as 17 May 2018.

The **Time bookings for WO Code [ ]** screen will be displayed.

- Here you can **Add**, **Edit**, **Delete** and **View** a list of labour time bookings linked to this work order.

Time bookings for WO Code W00001663 - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Processing | Format | Print | Cur...

Drag a column header here to group by that column

EmployeeNumber	FirstName	LastName	CraftName	ScheduledStartDate	StartDate	StartTime	ArrivalTime	EstLabourHours	RegularHours	OvertimeHours	OvertimeFactor	Comments	Billable
MIL001	Abigail	Mine	ACMN	15 May 2018	15 May 2018	10:41:58	10:41:58	0.00	0.25	0.00	1.00	Time Labour	No
JOE001	Joel	James	TECH	15 May 2018	15 May 2018	12:00:00	12:00:00	0.00	2.00	0.00	1.00	Repair	No

Open Windows | 17 May 2018

## Services

- In the **Maintain WO - Ref [ ]** screen, click on the **Services** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' interface. The left-hand navigation menu has the 'Services' tile highlighted. The main content area is divided into several sections:

- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:**
  - Functional Location:  Equipment:
  - Item: 19-12345
  - Comment: [Empty text area]
- Links:**

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
  - Assigned To: Abigail Mine
  - Assigned By: Abigail Mine
  - Scheduled Start: 15 May 2018 10:40:29
  - Scheduled End: 14 Jun 2018 00:00:00
  - Actual Start: 14 Jun 2018 00:00:00
  - Actual End: 14 Jun 2018 00:00:00
  - Delay Comments: Currently on Schedule
  - Rectification Code: [Empty dropdown]
  - Rectification Comments: [Empty text area]
  - Completion Date: 14 Jun 2018 00:00:00

The **Internal Services for WO Code [ ]** screen will be displayed.

- Here you can **Add** to, **Edit**, **Delete** and **View** a list of requests for in-house service (non-stock) work linked to this work order.

Internal services for WO Code WO0001663 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Export Refresh

Processing Format Print Cut...

Drag a column header here to group by that column

ServiceCode	ServiceDescription	Quantity	Price	Billable	Status
CALL	Call Out Fee	1	100.00	No	A

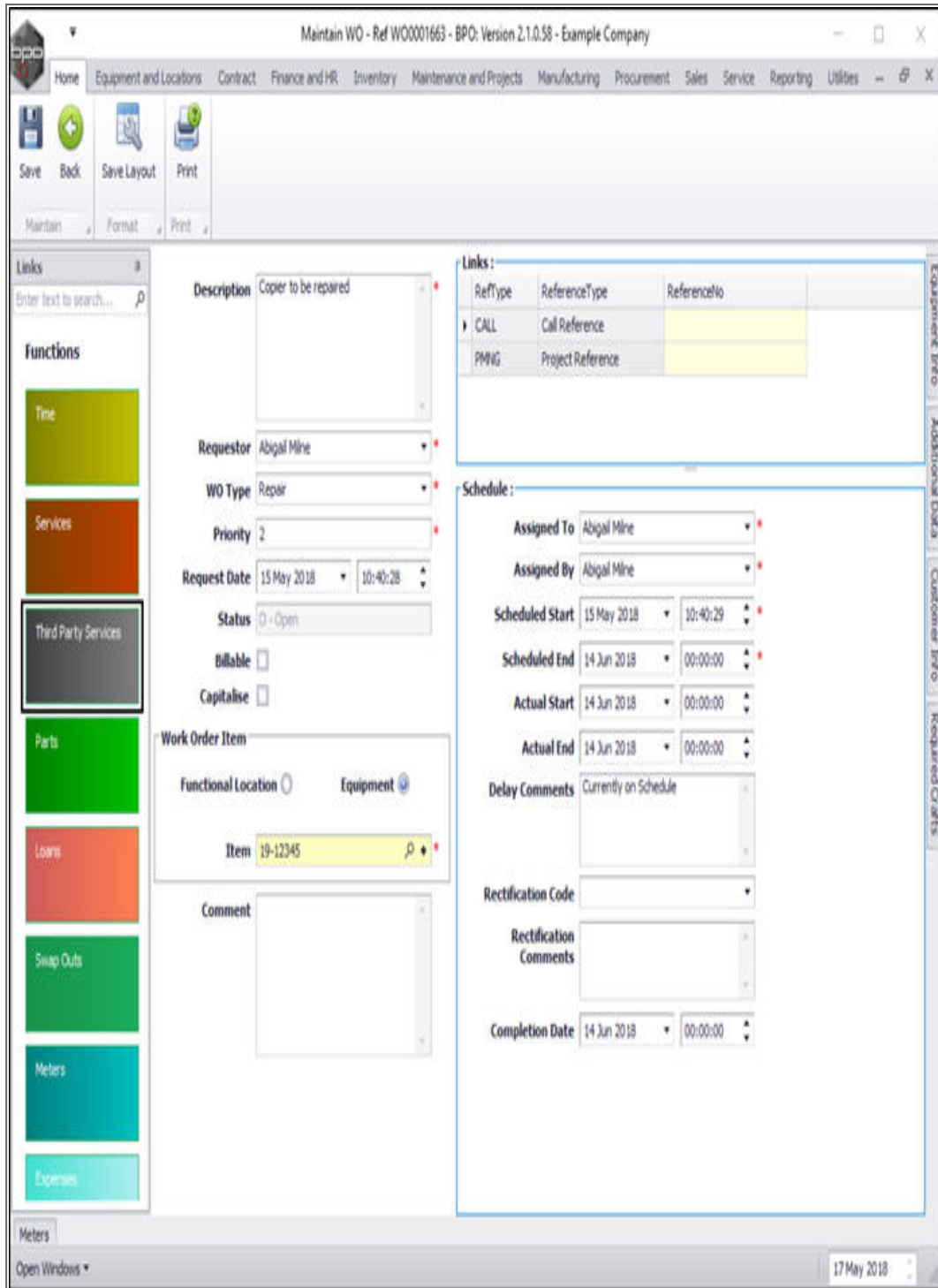
Open Windows 17 May 2018

## **THIRD PARTY SERVICES**

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- In the **Maintain WO - Ref [ ]** screen, click on the **Third Party Services** tile.





The **Services Requests for WO Code [ ]** screen will be displayed.

- Here you can **Add**, **Edit**, **Delete** and **View** a list of requests for third party contract work linked to this work order.

Service Requests for WO Code W00001663 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Bilibie Durban Refresh Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

WCode	WDescription	WorkCode	WorkDescription	RequestorName	RequiredDate	Comments	Quantity	ProcessStatus	EstimatedPrice	TotalCo
W00001663	Copier to be repaired	DEL	Delivery Fee	Abigal Mine	17 May 2018	Parts to be delivered by external delivery company	1	Requisition Required	150.00	150.00

Open Windows 17 May 2018

## Parts

- In the **Maintain WO - Ref [ ]** screen, click on the **Parts** tile.

The screenshot shows the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company' interface. The 'Parts' tile in the left-hand 'Functions' menu is highlighted with a red box. The main window displays details for a work order item, including description, requestor, type, priority, date, status, and a table of links.

**Work Order Item Details:**

- Description: Copier to be repaired
- Requestor: Abigail Mine
- WO Type: Repair
- Priority: 2
- Request Date: 15 May 2018 10:40:28
- Status: Open
- Billable:
- Capitalise:
- Functional Location: Equipment
- Item: 19-12345
- Comment: (empty)

**Links Table:**

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	

**Schedule:**

- Assigned To: Abigail Mine
- Assigned By: Abigail Mine
- Scheduled Start: 15 May 2018 10:40:29
- Scheduled End: 14 Jun 2018 00:00:00
- Actual Start: 14 Jun 2018 00:00:00
- Actual End: 14 Jun 2018 00:00:00
- Delay Comments: Currently on Schedule
- Rectification Code: (empty)
- Rectification Comments: (empty)
- Completion Date: 14 Jun 2018 00:00:00

The **Part Requests for WO Code [ ]** screen will be displayed.

- Here you can **Add** to, **Edit**, **Delete** and **View** a list of requests for parts from store linked to this work order

Part Requests for WO Code W00001663 - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | Back | Save Layout | Workspaces | Save Filter | Requisition | Issue | Transfer | Note | Change Whse | Remap Part | Create Part

Durban | All States | Refresh | Print | Export

Maintenance | Format | Process | Current | Print

Drag a column header here to group by that column

DodId	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	SourceType	RequiredDate	State	ProjectRef	ProjectDesc	CallReference
PQ00001948	2020-147K	Black toner SP2020	C	Main Warehouse	DBN-A1	1.00	1.00	WKOR	15 May 2018	PO			
PQ00001949	DR1111111	Drum	B	Main Warehouse	DBN-A1	1.00	0.00	WKOR	16 May 2018	N			

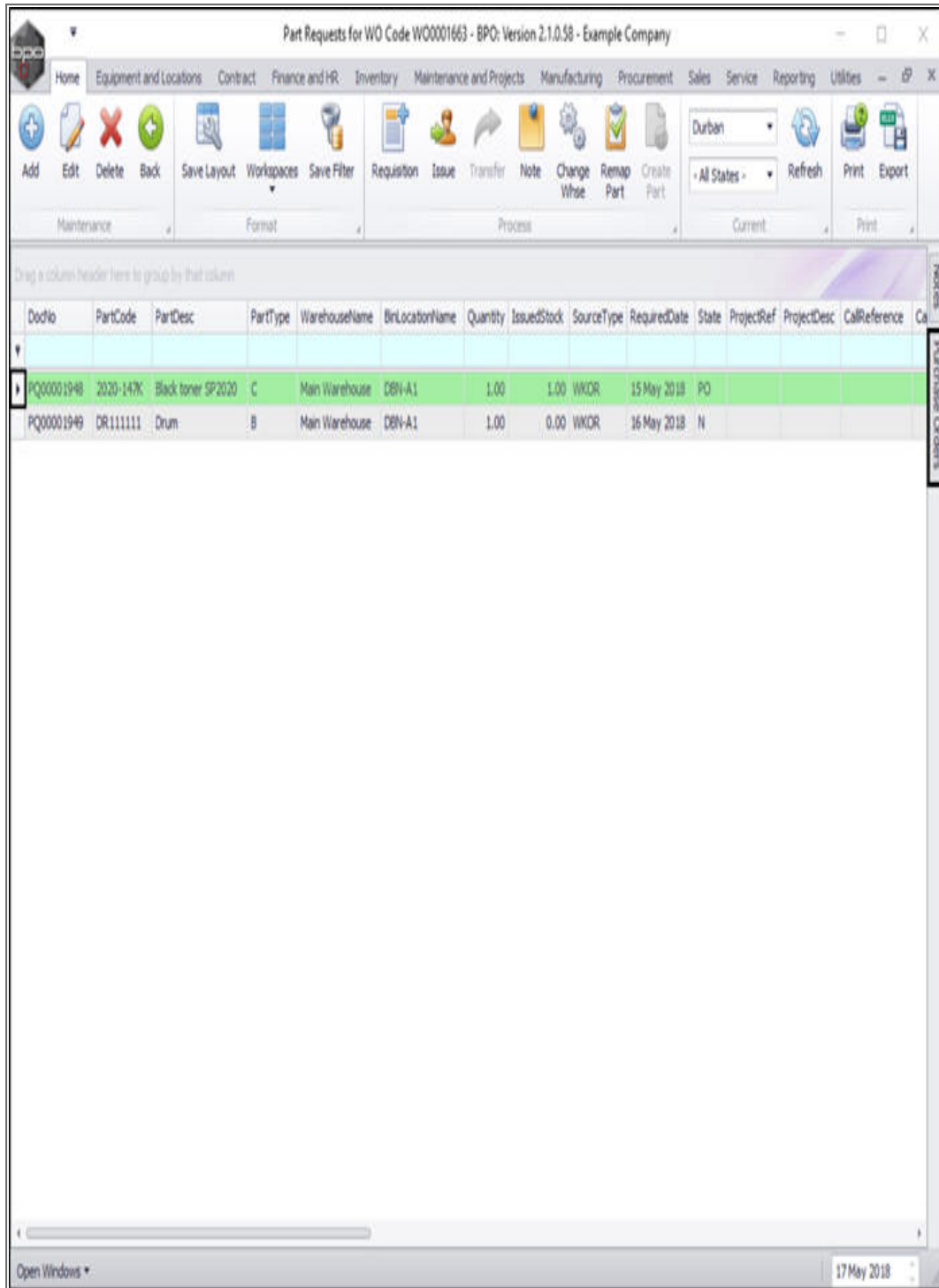
Open Windows | 17 May 2018

### Purchase Orders

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In this screen you can also view the **Purchase Orders** linked to each part request.

- Click on the **row selector** in front of any **part request**.
- Click on the **Purchase Orders** tab on the right side of the screen.



- The docking panel will be expanded to display all the **purchase orders** linked to the selected **part**.

Part Requests for WO Code W00001663 - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | Back | Save Layout | Workspaces | Save Filter | Requisition | Issue | Transfer | Note | Change Whtse | Remap Part | Create Part

Durban | - All States - | Refresh | Print | Export

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Drag a column header here to group by that column

DodNo	PartCode	PartDesc	PartType	WarehouseName
PQ00001948	2020-147K	Black toner SP2020	C	Main Warehouse
PQ00001949	DR1111111	Drum	B	Main Warehouse

Drag a column header here to group by that column

POCode	PartType	PartCode	PartDesc	SupplierCode	SupplierName	UnitCost	Quantity
P00000244	C	2020-147K	Black toner SP2020	SPR001	Sprint Distributors Local	450.00	2
P00000244	C	2020-147K	Black toner SP2020	SPR001	Sprint Distributors Local	450.00	2
P00000332	C	2020-147K	Black toner SP2020	SPR001	Sprint Distributors Local	459.26	361
P00000340	C	2020-147K	Black toner SP2020	SPR001	Sprint Distributors Local	459.26	0
P00000430	C	2020-147K	Black toner SP2020	YES001	Young Electric	500.00	6
P00000431	C	2020-147K	Black toner SP2020	YES001	Young Electric	500.00	5
P00000446	C	2020-147K	Black toner SP2020	SPR002	Sprint International	483.63	1

Open Windows | 17 May 2018



## Loans

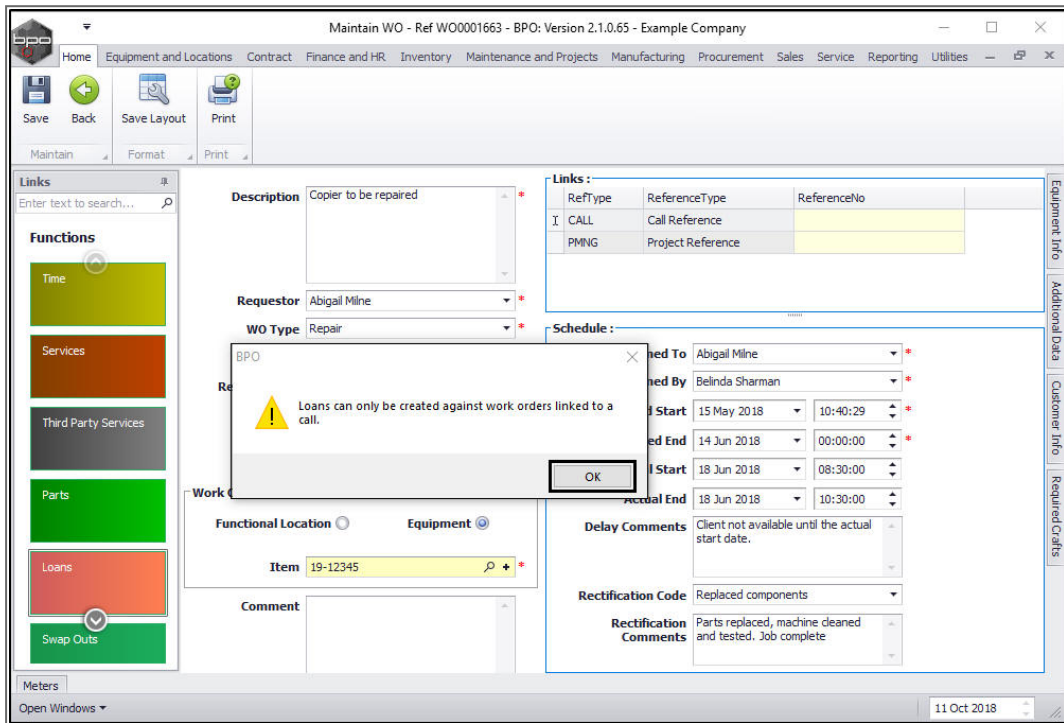
- In the **Maintain WO - Ref [ ]** screen, click on the **Loans** tile.

The screenshot shows the 'Maintain WO - Ref WO0001663' interface. The 'Loans' tile is selected in the left-hand 'Functions' menu. The main window displays the following details:

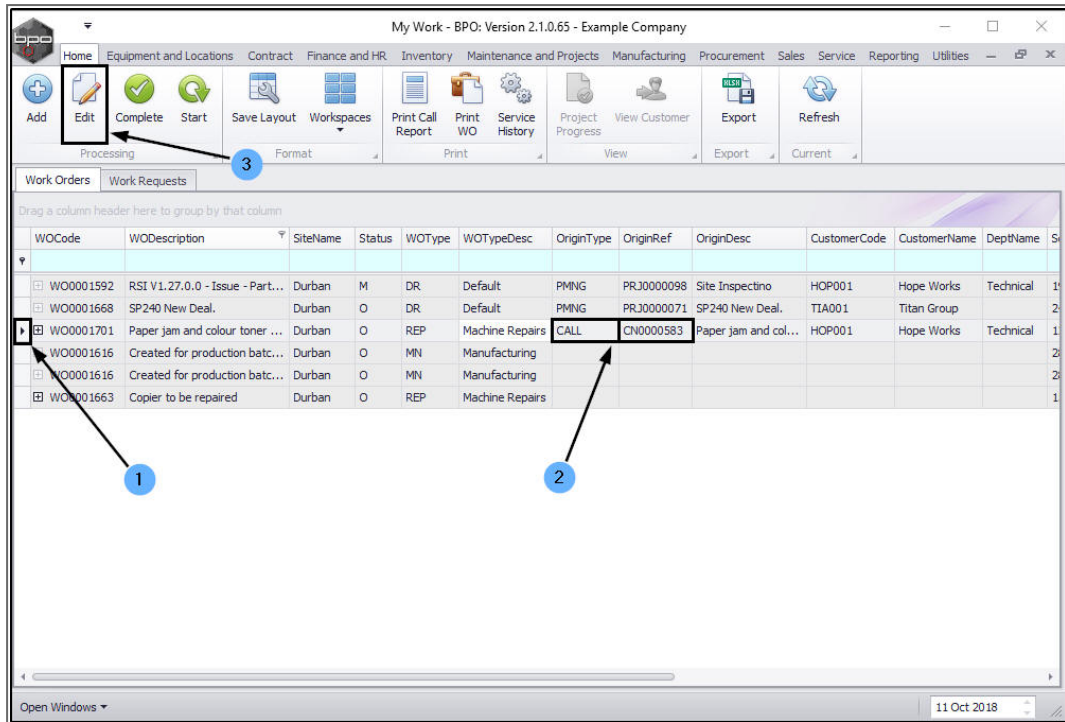
- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:**
  - Functional Location:
  - Equipment:
  - Item: 19-12345
  - Comment: [Empty text area]
- Links Table:**

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
  - Assigned To: Abigail Mine
  - Assigned By: Abigail Mine
  - Scheduled Start: 15 May 2018 10:40:29
  - Scheduled End: 14 Jun 2018 00:00:00
  - Actual Start: 14 Jun 2018 00:00:00
  - Actual End: 14 Jun 2018 00:00:00
  - Delay Comments: Currently on Schedule
  - Rectification Code: [Empty dropdown]
  - Rectification Comments: [Empty text area]
  - Completion Date: 14 Jun 2018 00:00:00

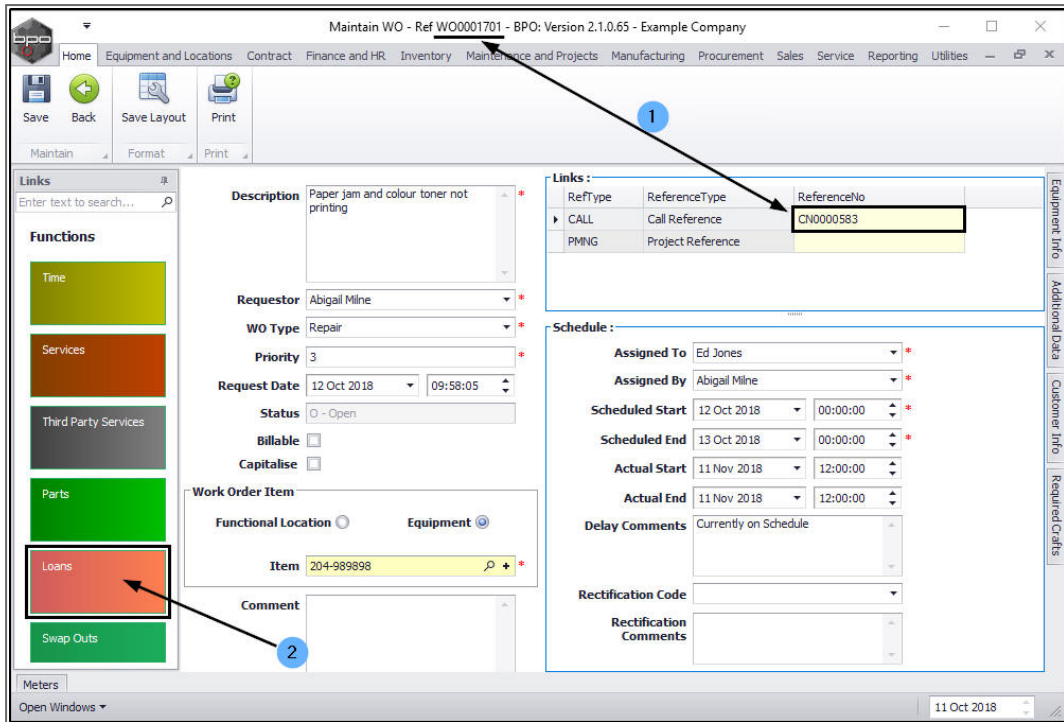
- If your initially selected work order is not linked to a **call** then the following BPO processing message will pop up;
  - **Loans can only be created against work orders linked to a call.**
- Click on **OK**.



1. Go back to the **My Work** listing screen and select a work order that is **linked to a call**.
2. Check the **Origin Type** and **Origin Reference** column to see whether the selected work order is linked to a **call**
3. Click on **Edit**.



- The **Maintain WO - Ref [ ]** screen will be displayed for the selected work order that is now linked to a **call**.
- Click on the **Loans** tile.



The **Loan Requests for WO Code [ ]** screen will be displayed.

- Here you can **Add** to, **Edit**, **Delete** and **View** a list of loan requests from store linked to this work order.

Loan Requests for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pro... Cur... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	NMACH	New Machine	A	Assets Warehouse	Internal Assets	1.00	0.00	11 Oct 2018	Abigail Milne		No	A

Open Windows 11 Oct 2018

## Swap Outs

- In the **Maintain WO - Ref [ ]** screen, click on the **Swap Outs** tile.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Print

Maintain | Format | Print

Links: Enter text to search...

Functions: Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses

Description: Copier to be repaired

Requestor: Abigail Mine

WO Type: Repair

Priority: 2

Request Date: 15 May 2018 10:40:28

Status: 0 - Open

Billable:  Capitalise:

Work Order Item: Functional Location: Equipment, Item: 19-12345

Comment: [Empty]

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	

Schedule:

Assigned To: Abigail Mine

Assigned By: Abigail Mine

Scheduled Start: 15 May 2018 10:40:29

Scheduled End: 14 Jun 2018 00:00:00

Actual Start: 14 Jun 2018 00:00:00

Actual End: 14 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

Rectification Code: [Empty]

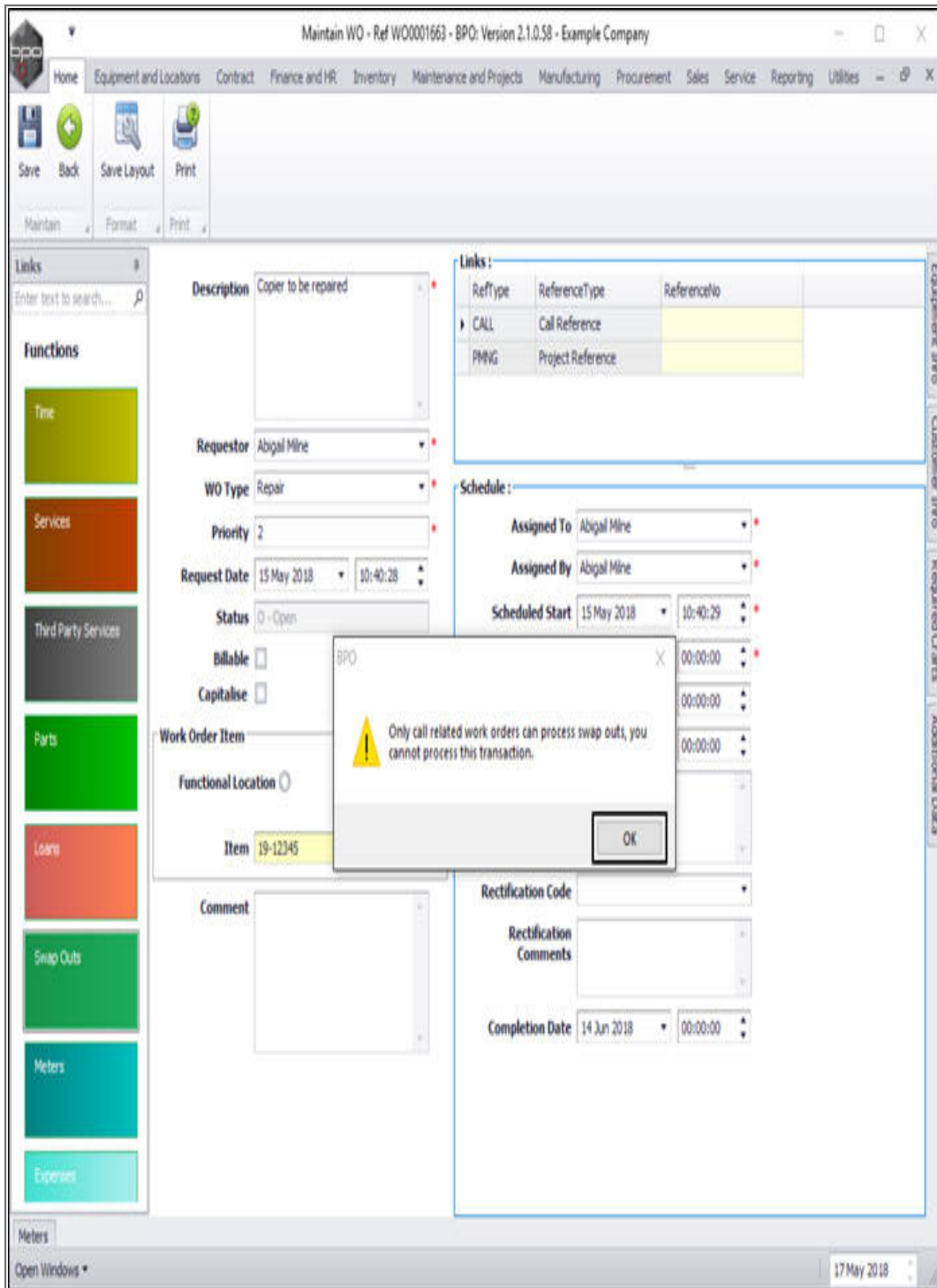
Rectification Comments: [Empty]

Completion Date: 14 Jun 2018 00:00:00

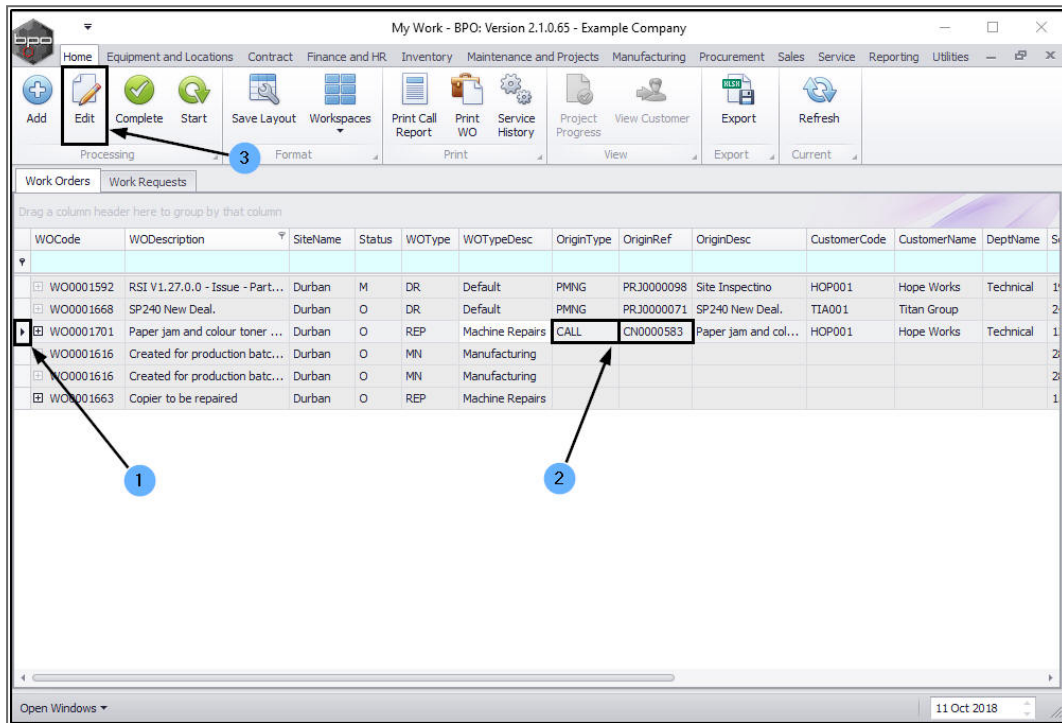
Meters | Open Windows | 17 May 2018

- If your initially selected work order is not linked to a **call** then the following **BPO** processing message will pop up;

- Only call related work orders can process swap outs, you cannot process this transaction.
- Click on **OK**.

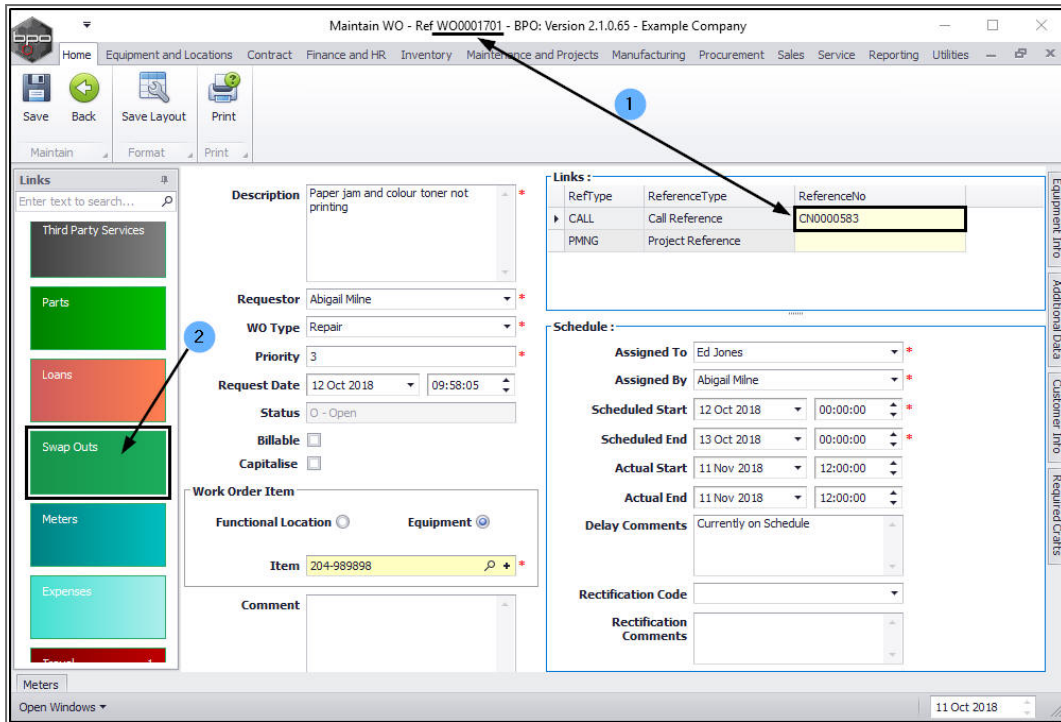


1. Go back to the **My Work** listing screen and select a work order that is linked to a **call**.
2. Check the **Origin Type** and **Origin Reference** column to see whether the selected work order is linked to a **call**
3. Click on **Edit**.



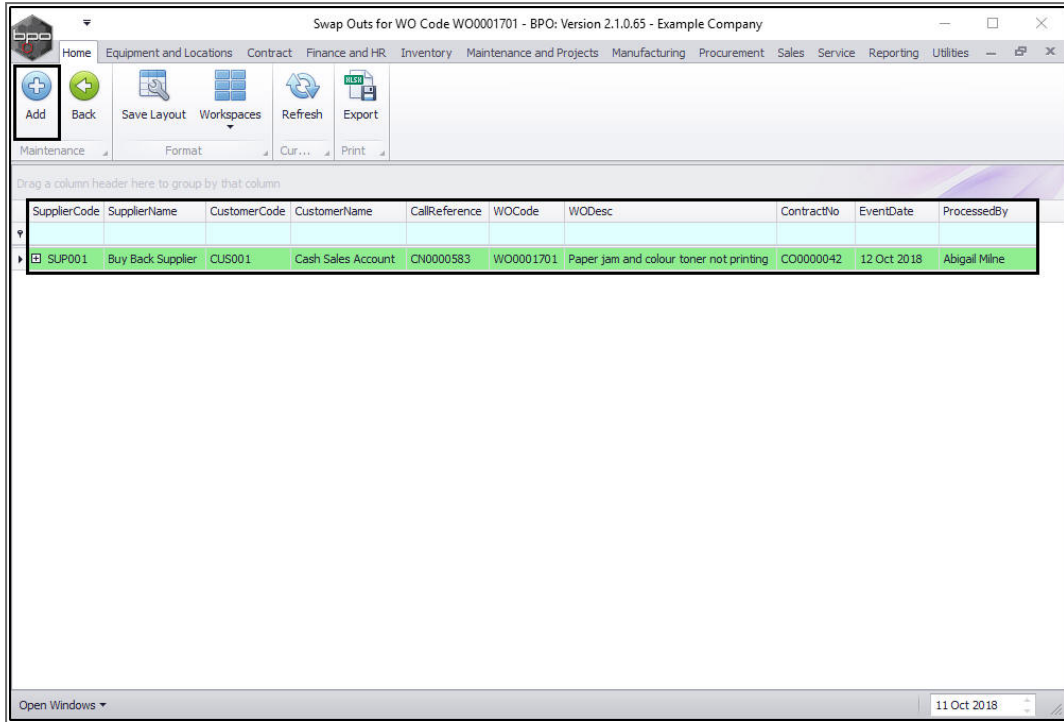
- The **Maintain WO - Ref [ ]** screen will be displayed for the selected work order that is now linked to a **call**.
- Click on the **Swap Outs** tile.





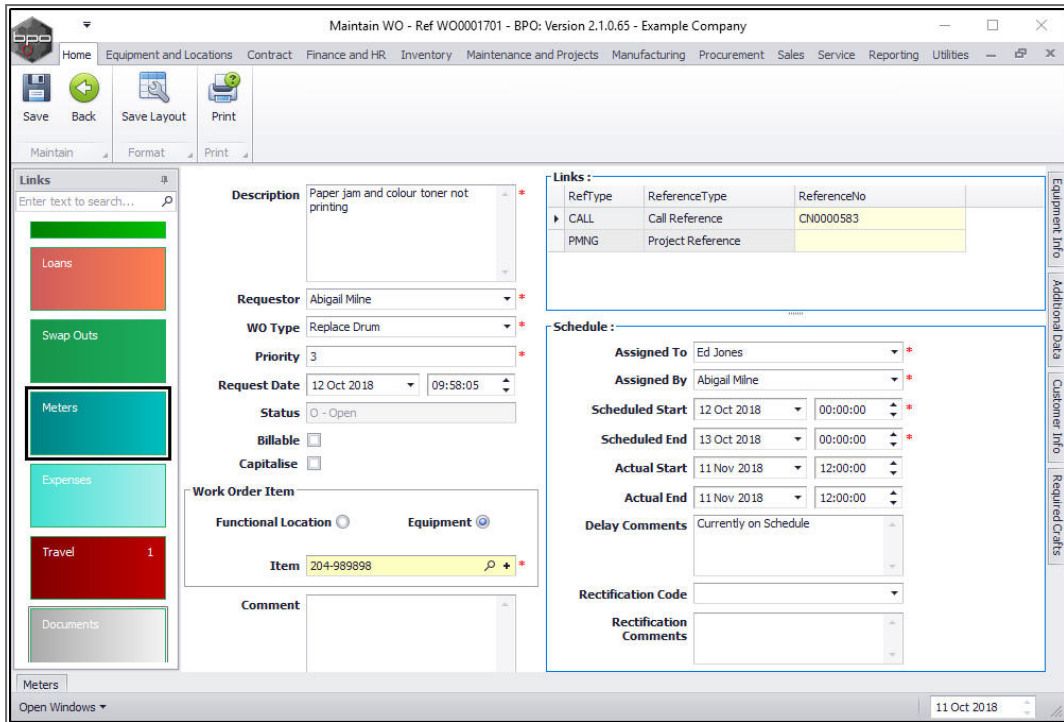
The **Swap Outs for WO Code [ ]** screen will be displayed.

- Here you can **Add** to and **View** a list of swap outs from store linked to this work order.



## Meters

- In the **Maintain WO - Ref [ ]** screen, click on the **Meters** tile.



The **Meters for WO Code [ ]** screen will be displayed.

- Here you can view a list of the **meter readings** for the items linked to the selected work order.
- In this screen you can edit/add to the **Reading Date, Reading Time, Meter Reading** and **Comments** columns as required.

Meters for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Refresh

Processing | Format | Cur...

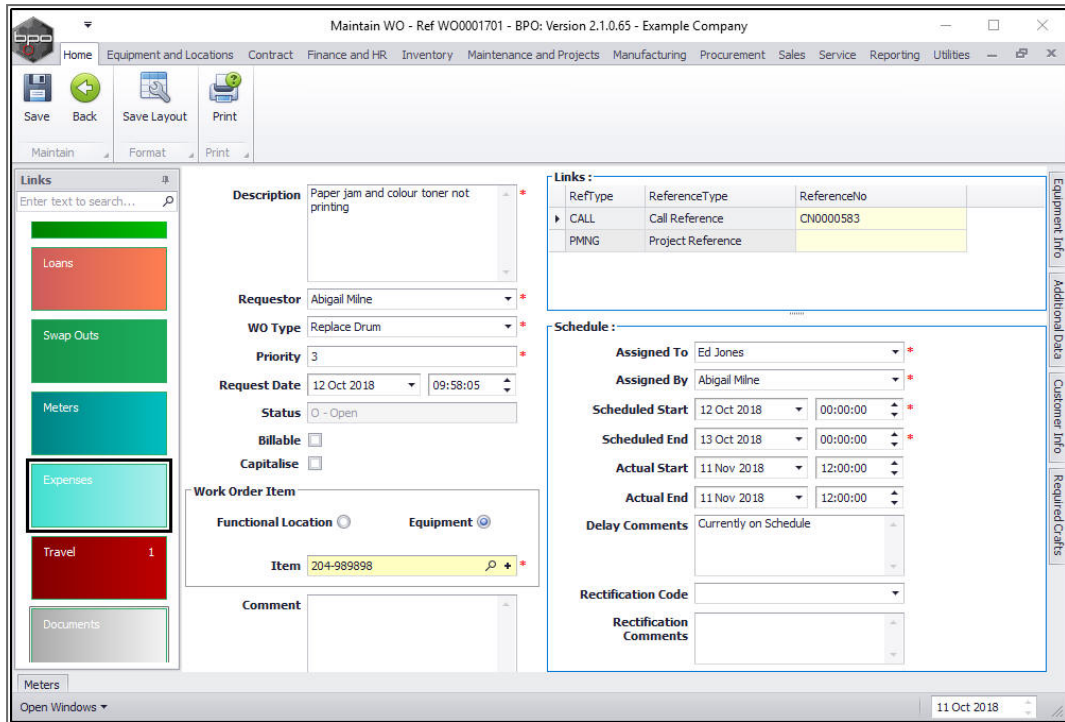
Drag a column header here to group by that column

MeterCode	SourceType	ItemType	SignalTag	Unit	CodeDescription	ReadingDate	ReadingTime	RollCount	MeterReading	Comments
▶ Mono_409	CALL	ASMN		Copies	Copies made	12 Oct 2018	10:00:21	0	0.00	
Colour_409	CALL	ASMN		Copies	Copies made	12 Oct 2018	10:00:21	0	0.00	

Open Windows | 11 Oct 2018

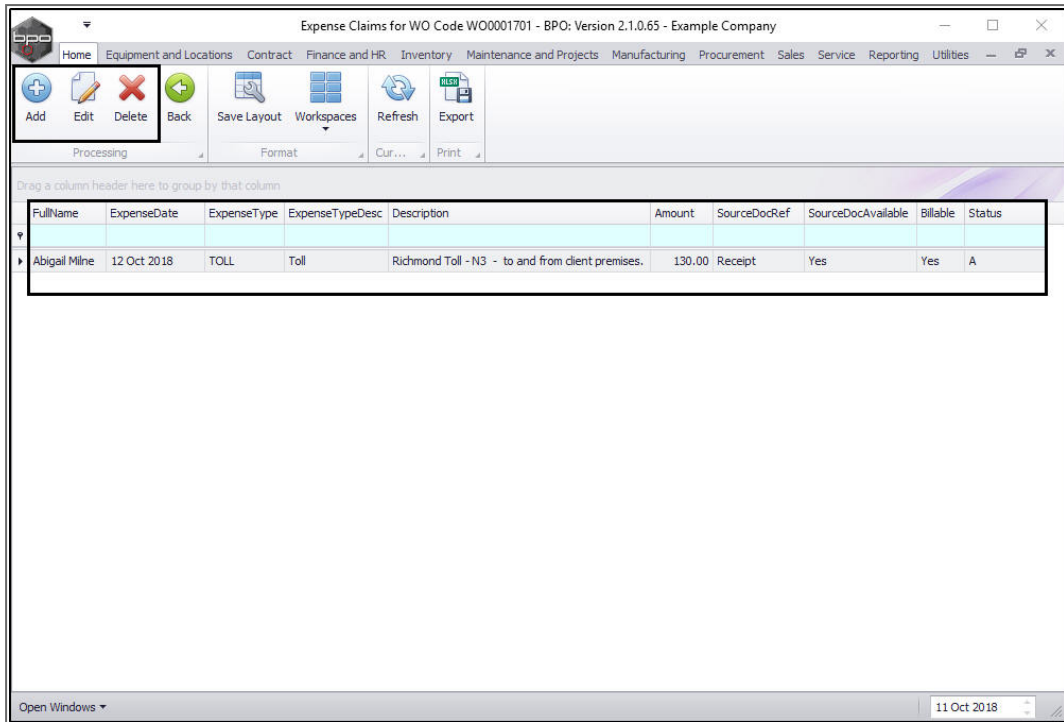
## Expenses

- In the **Maintain WO - Ref [ ]** screen, click on the **Expenses** tile.



The **Expense Claims for WO Code [ ]** screen will be displayed.

- Here you can view a list of the **expense claims** linked to the selected work order.
- In this screen you can **Add, Edit** or **Delete** expense claims as required.

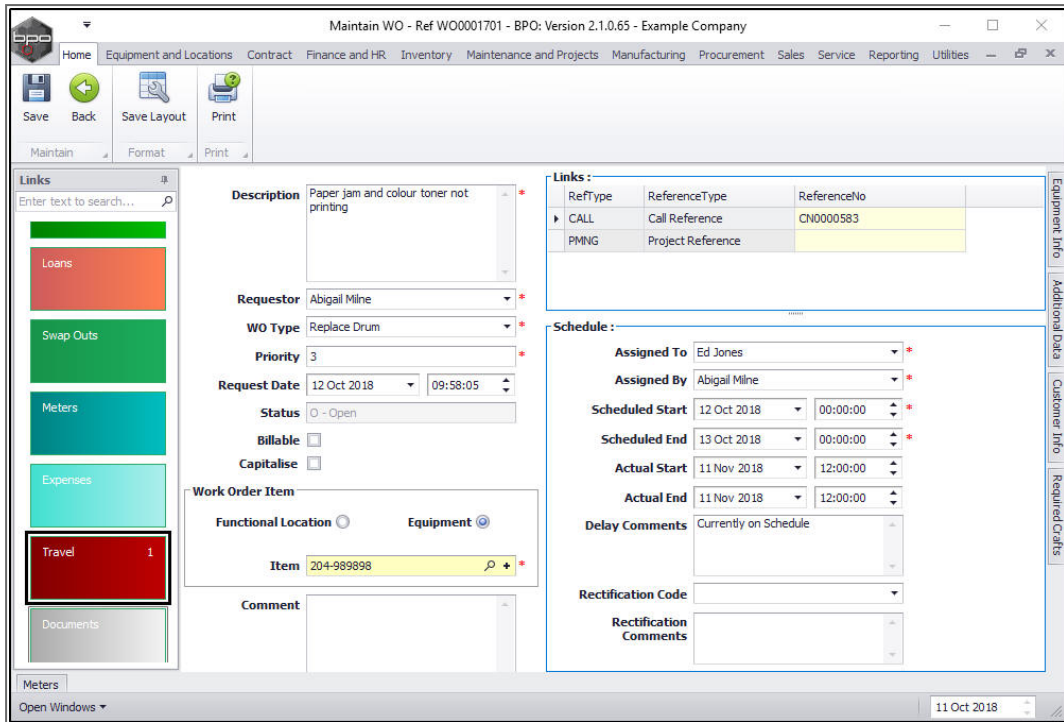


The screenshot shows a software window titled "Expense Claims for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company". The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Workspaces, Refresh, and Export. The main area contains a table with the following data:

FullName	ExpenseDate	ExpenseType	ExpenseTypeDesc	Description	Amount	SourceDocRef	SourceDocAvailable	Billable	Status
Abigail Milne	12 Oct 2018	TOLL	Toll	Richmond Toll - N3 - to and from client premises.	130.00	Receipt	Yes	Yes	A

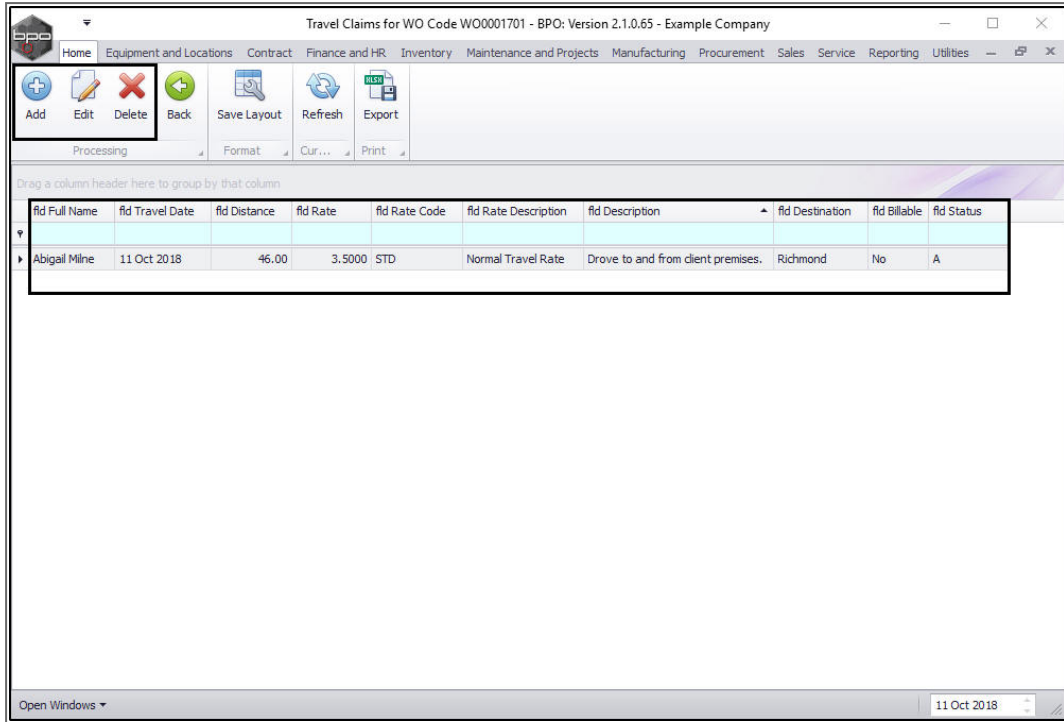
## Travel

- In the **Maintain WO - Ref [ ]** screen, click on the **Travel** tile.



The **Travel Claims for WO Code [ ]** screen will be displayed.

- Here you can view a list of the **travel claims** linked to the selected work order.
- In this screen you can **Add, Edit** or **Delete** travel claims as required.

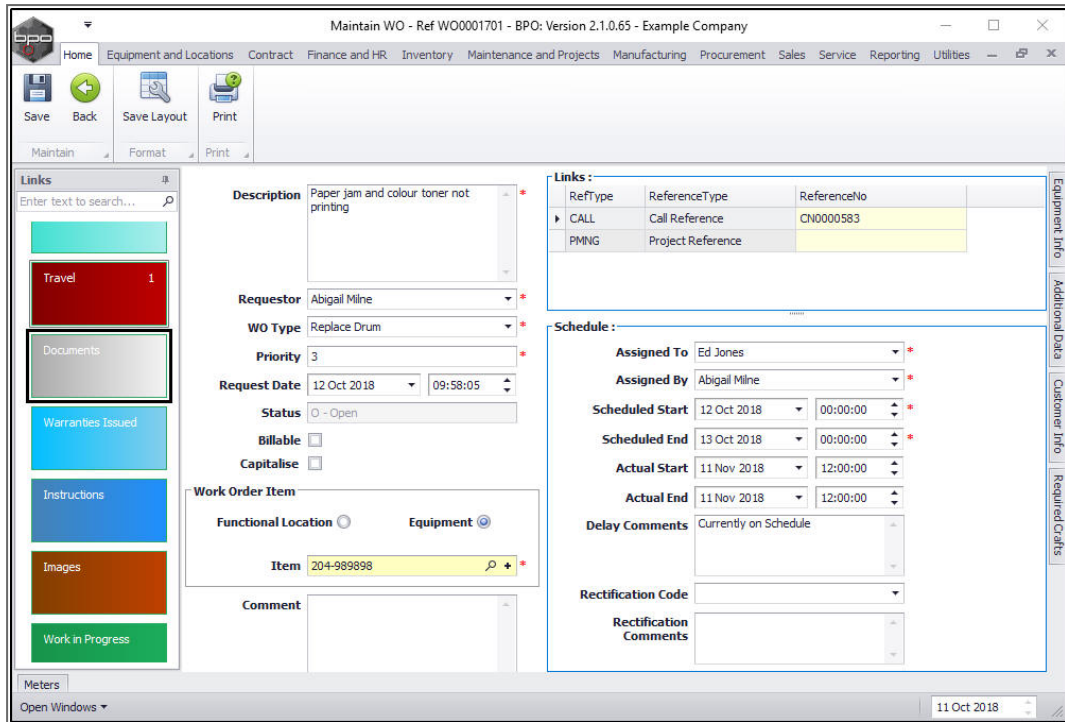


fd Full Name	fd Travel Date	fd Distance	fd Rate	fd Rate Code	fd Rate Description	fd Description	fd Destination	fd Billable	fd Status
Abigail Milne	11 Oct 2018	46.00	3.5000	STD	Normal Travel Rate	Drove to and from client premises.	Richmond	No	A

## Documents

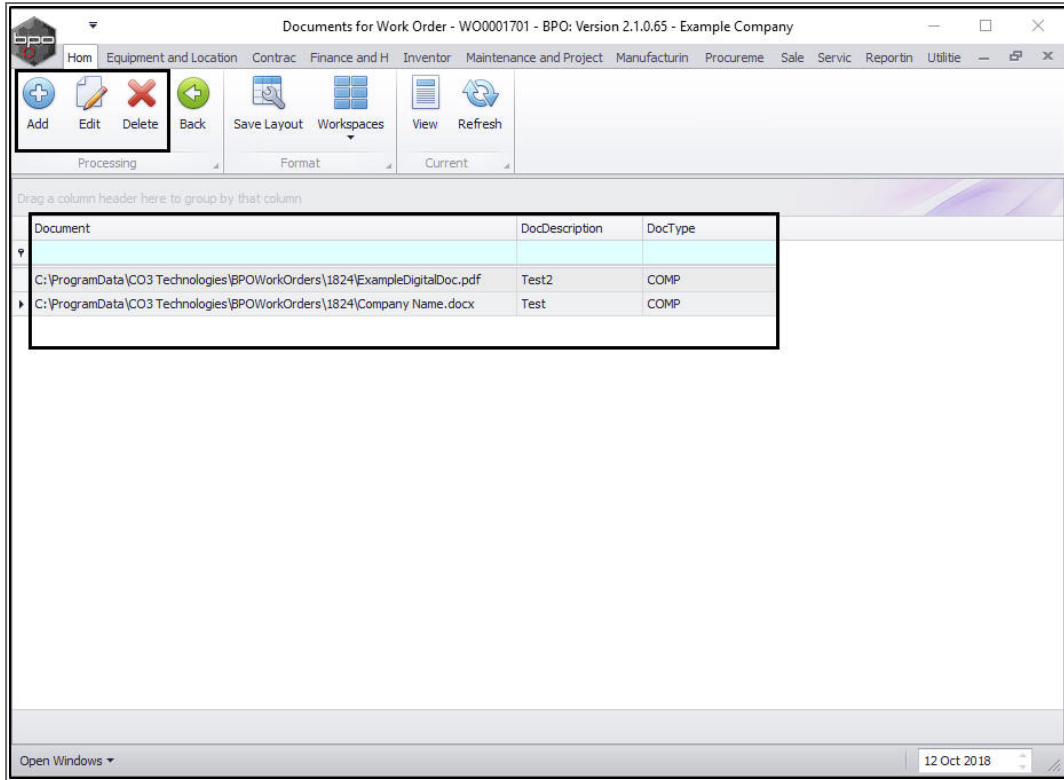
- In the **Maintain WO - Ref [ ]** screen, click on the **Documents** tile.





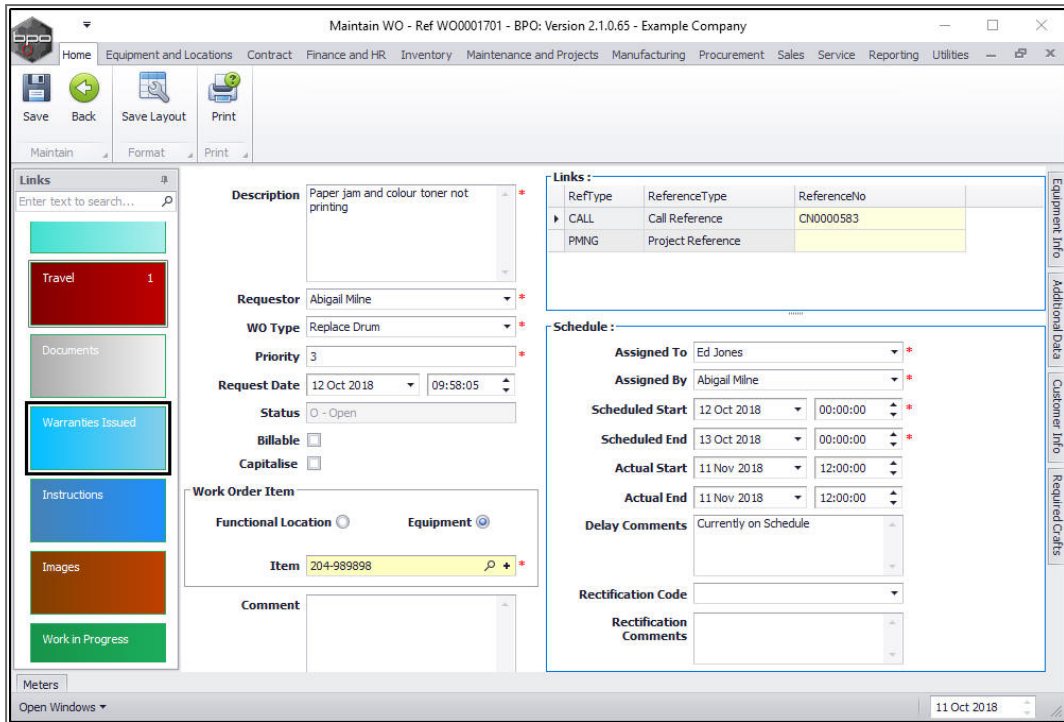
The **Documents for WO Code [ ]** screen will be displayed.

- Here you can view a list of the **digital documents** linked to the selected work order.
- In this screen you can **view, Add, Edit** or **Delete** digital documents as required.



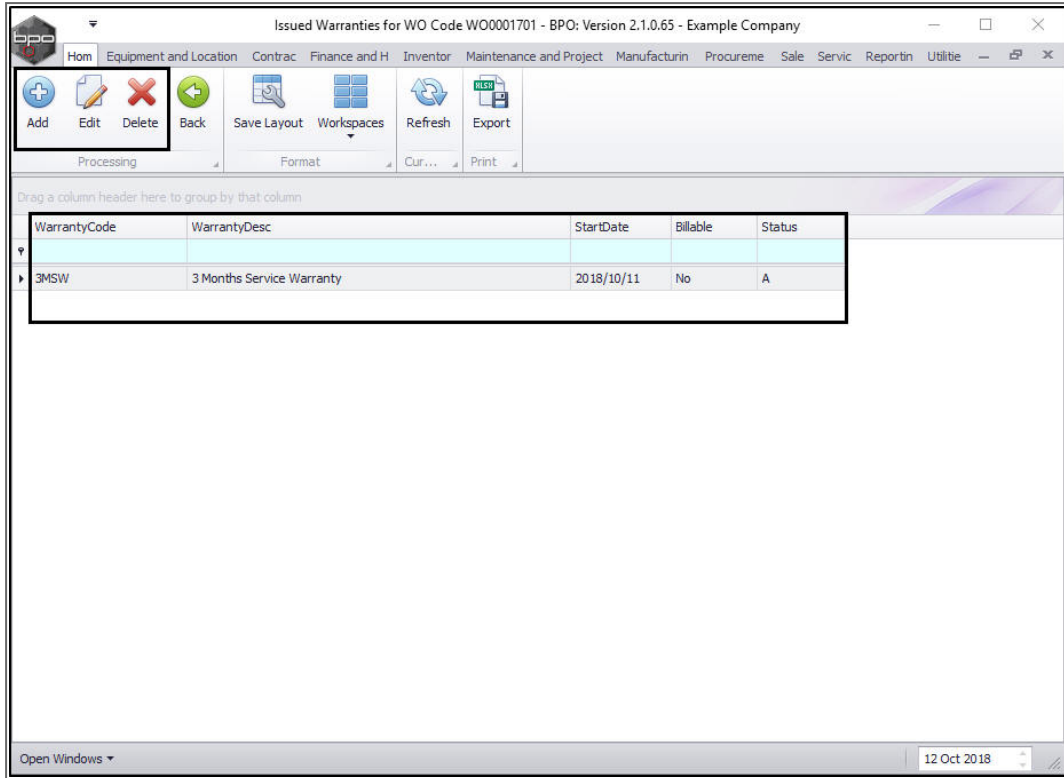
## Warranties Issued

- In the **Maintain WO - Ref [ ]** screen, click on the **Warranties Issued** tile.



The **Issued Warranties for WO Code [ ]** screen will be displayed.

- Here you can view a list of the **issued warranties** linked to the selected work order.
- In this screen you can **Add, Edit** or **Delete** warranties as required.



Issued Warranties for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Location Contract Finance and H Inventor Maintenance and Project Manufacturin Procureme Sale Servic Reportin Utilite

Add Edit Delete Back Save Layout Workspaces Refresh Export

Processing Format Cur... Print

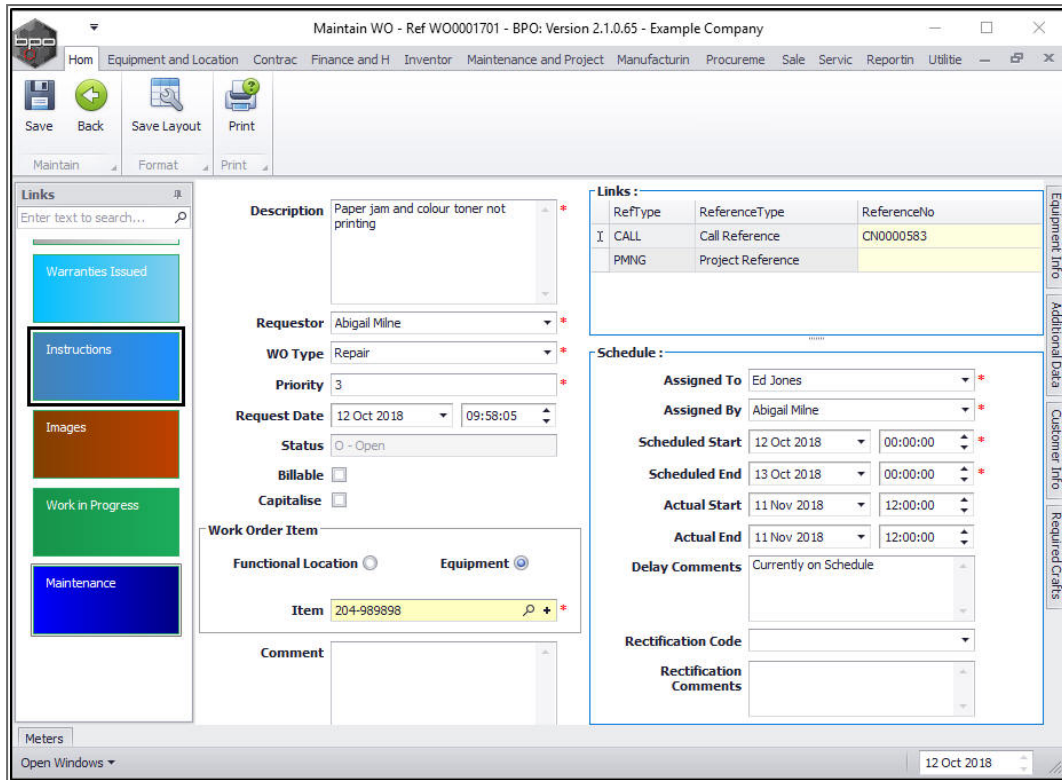
Drag a column header here to group by that column

WarrantyCode	WarrantyDesc	StartDate	Billable	Status
3MSW	3 Months Service Warranty	2018/10/11	No	A

Open Windows 12 Oct 2018

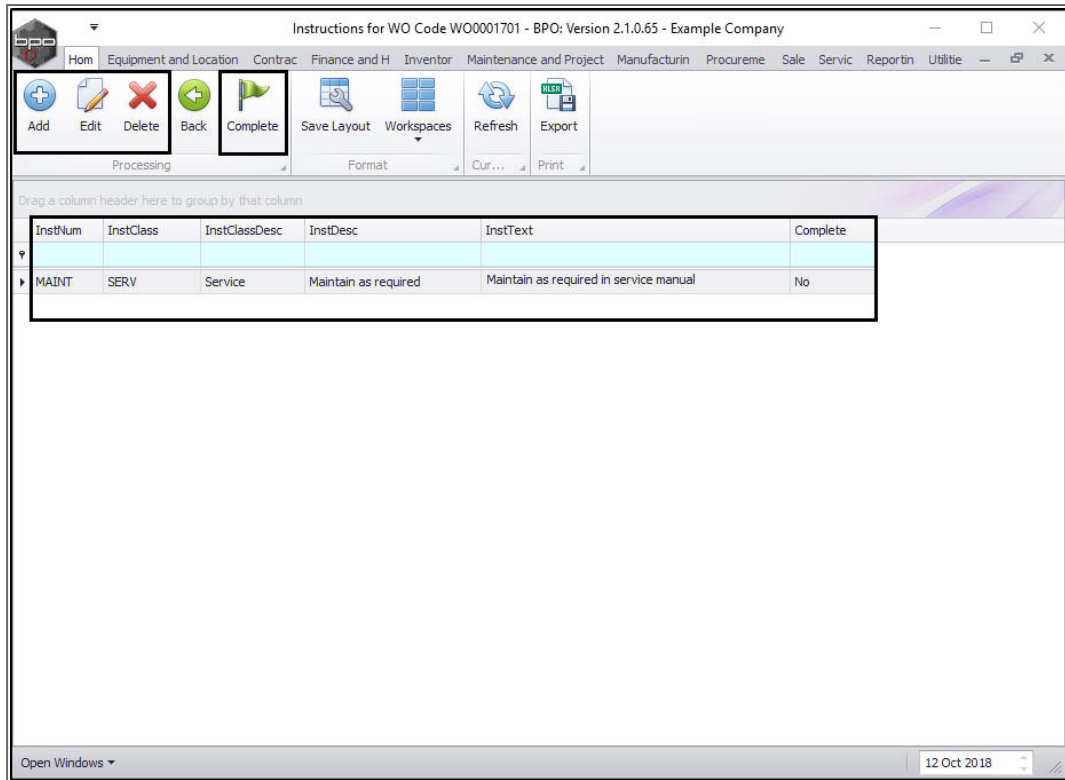
## Instructions

- In the **Maintain WO - Ref [ ]** screen, click on the **Instructions** tile.



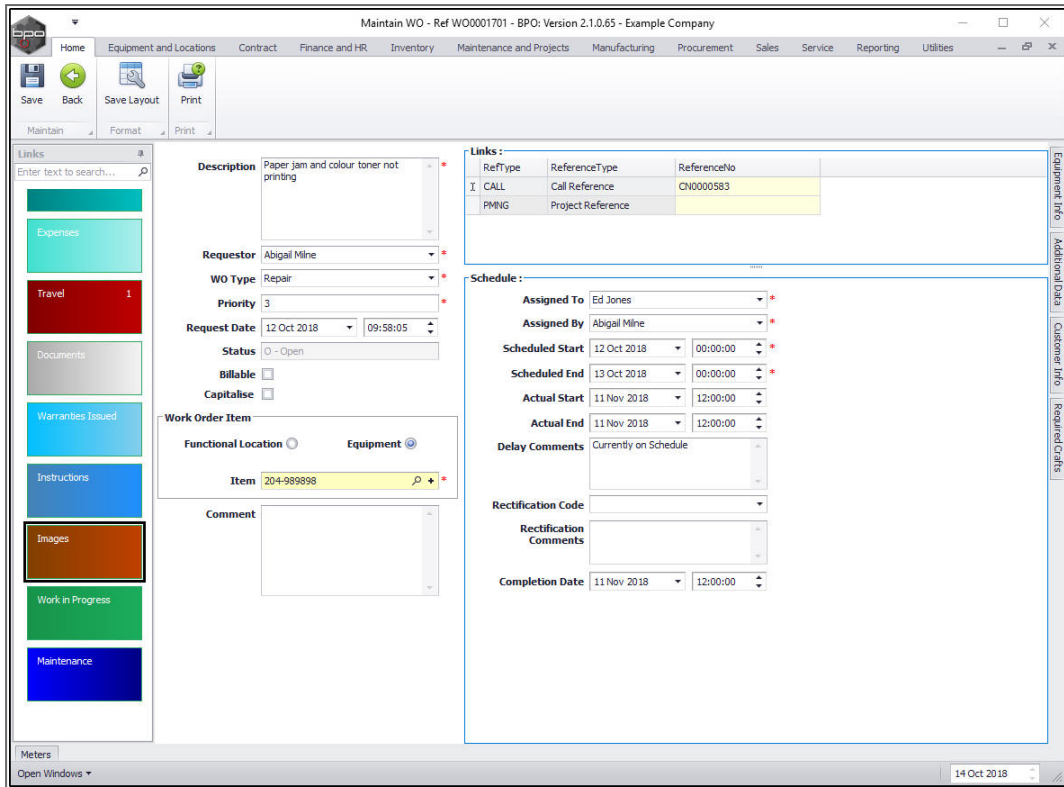
The **Instructions for WO Code [ ]** screen will be displayed.

- Here you can view a list of the **instructions** linked to the selected work order.
- In this screen you can **Add, Edit, Delete** or **Complete** instructions as required.



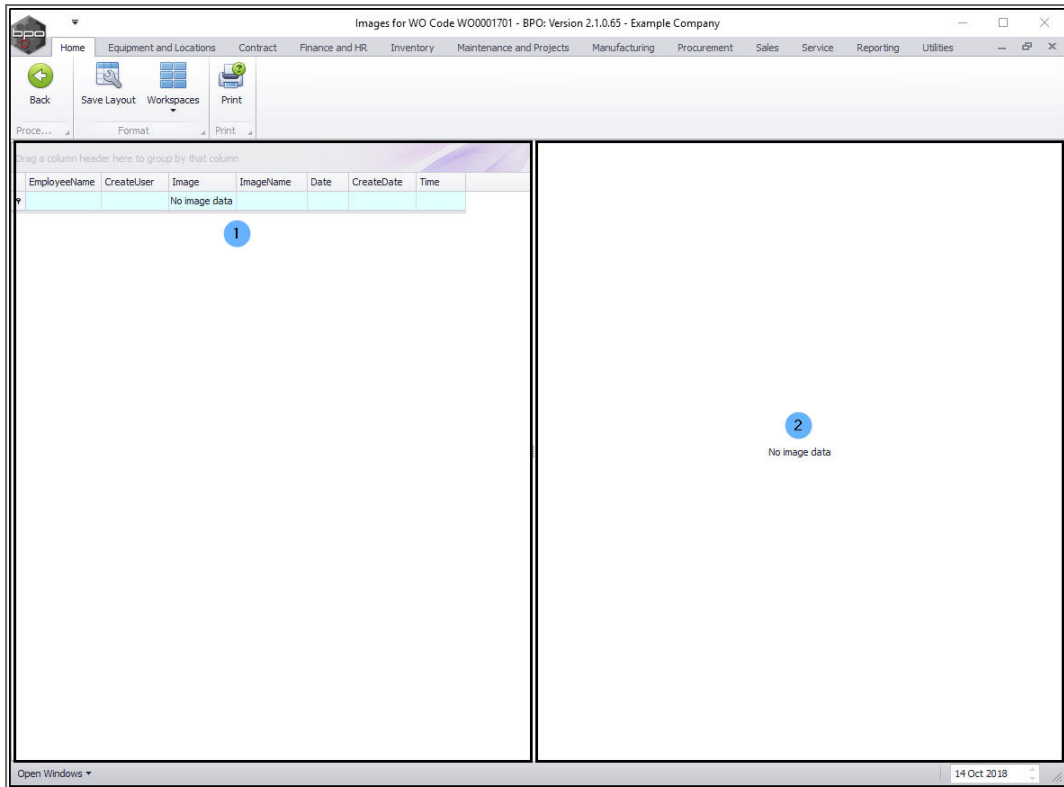
## Images

- In the **Maintain WO - Ref [ ]** screen, click on the **Images** tile.



The **Images for WO Code [ ]** screen will be displayed.

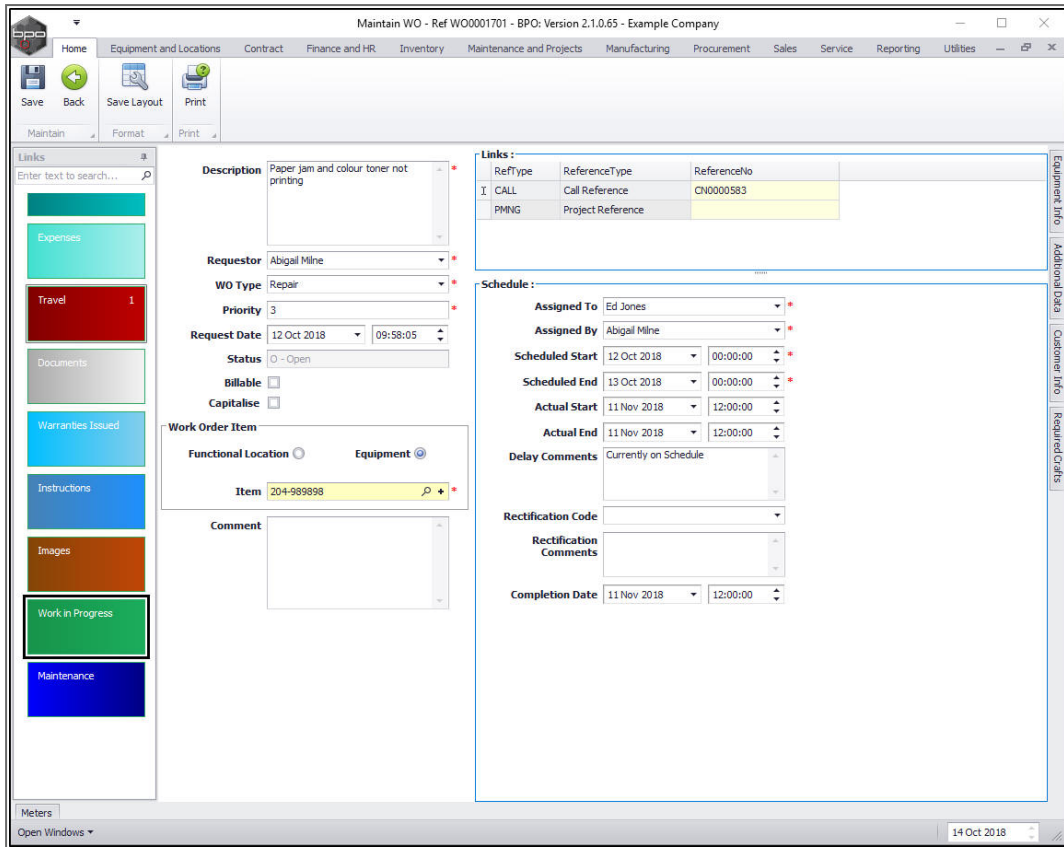
1. The left side of the screen will list the **employee name** and details of the **image name, date, create date** and **time**. Click on the row selector in front of the image name that you wish to view.
2. On the right side of the screen, is where you can view the **image**, when you have selected the row on the left.



## Work in Progress

- In the **Maintain WO - Ref [ ]** screen, click on the **Work in Progress** tile.





The **Work in Progress for WO Code [ ]** screen will be displayed.

1. Here you can view a list of all the **work in progress** for the selected work order.
2. In this screen you can **Return** the item linked to the WO, **Invoice the WO, Invoice the Call or Project** (depending on whether the work order is linked to a call or project).

Work in Progress for WO Code WO0001701 - BPO: Version 2.1.0.65 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Return Invoice WO | Invoice Call | Invoice Project | Back | Save Layout | Workspaces | Refresh | Export

Processing | Format | Cur... | Print

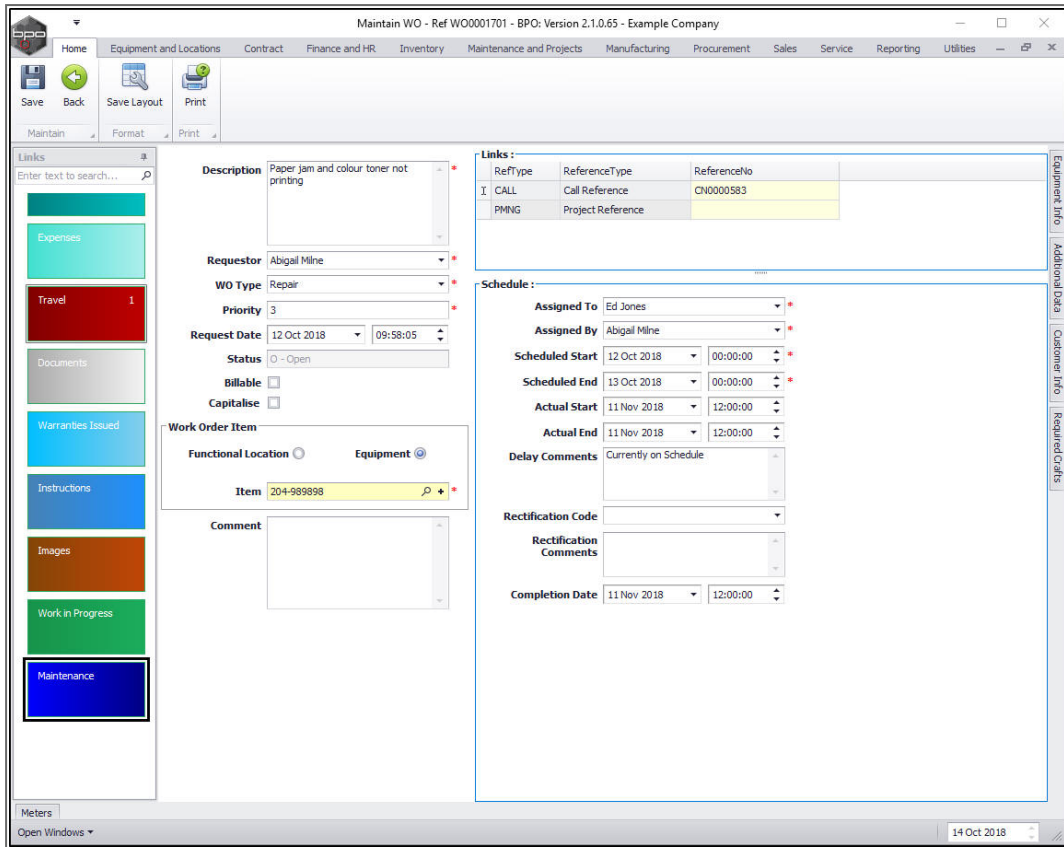
Drag a column header here to group by that column

DocNo	EventDate	SourceType	ItemType	ItemCode	ItemDesc	BatchNo	Quantity	UnitCost	Billable	WOCode	WODesc	CustomerCode	CustomerName
SI00000786	2018/10/12	INVI	INVN	SP1818	Sprint copier	1818-8594	1.00	5 000.00	No	WO0001701	Paper jam and colour toner not printing	HOP001	Hope Works

Open Windows | 14 Oct 2018

## Maintenance

- In the **Maintain WO - Ref [ ]** screen, click on the **Maintenance** tile.



The **Maintenance Methodology for Asset: [ ]** screen will be displayed.

- In this screen, you can **Add, Edit** or **Delete** a maintenance methodology as required.

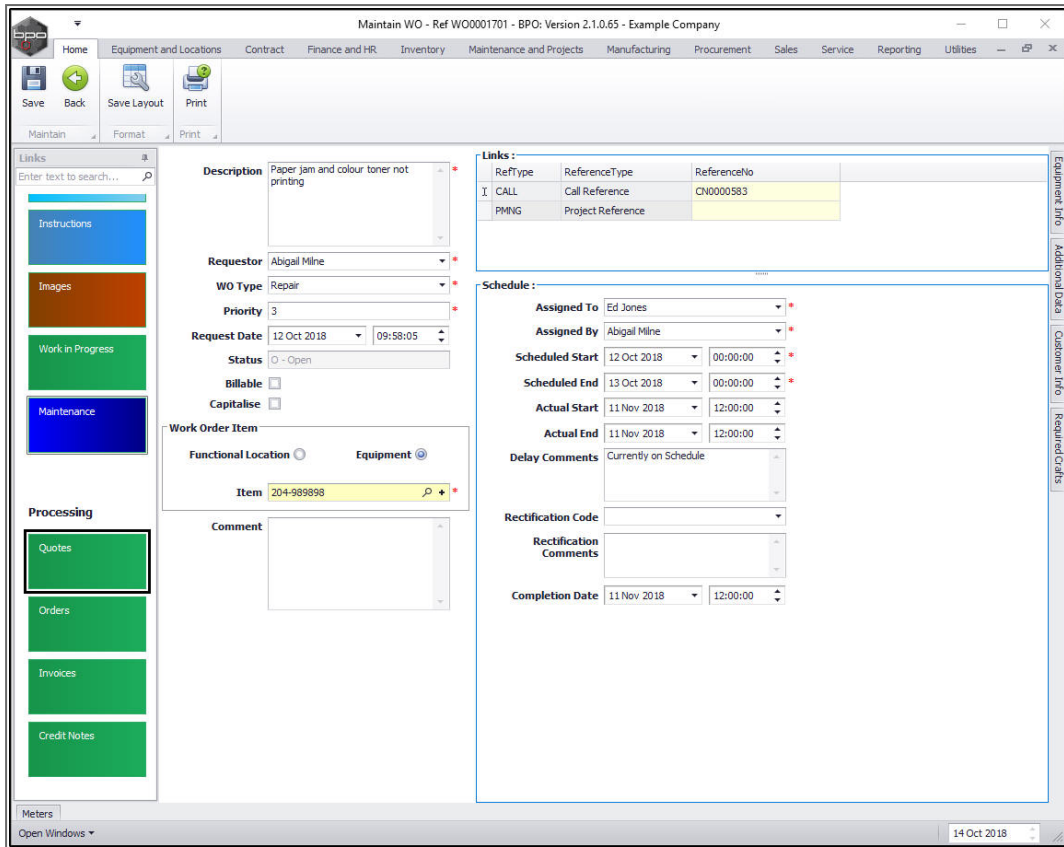
Drag a column header here to group by that column

TaskNum	TaskDesc	ScheduleType	ScheduleTypeDesc	MeterCode	Units	ServiceEvery	LastPerfDate	NextPerfDate	IncludeWeekEnds	IncludeHolidays	ExactInter...	MinBoundary	MaxBoundary	NoOfTimesCom
3MS	3 Month Service	T	Time		m	3.00	11 Oct 2018	10 Jan 2019	Yes	Yes	Yes	0.00	0.00	

## THE PROCESSING TILES

### Quotes

- In the **Maintain WO - Ref [ ]** screen, click on the **Quotes** tile.



The **Sales Quotes for Work Order [ ]** screen will be displayed.

- Here you can view a list of the **sales quotes** linked to the selected work order.
- In this screen you can **Add, Edit, Delete** or **View** a selected sale quote.
- You can also **Accept, Reject** or **Convert** the sales quote to an order as required.

Sales Quotes for Work Order WO0001701 - BPO: Version 2.1.0.65 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | View | Forward | Accepted | Rejected | Convert Order | Print | Export | Save Layout | Workspaces | Durban | New quote | Refresh

Maintain | Navig... | Process | Print | Format | Current

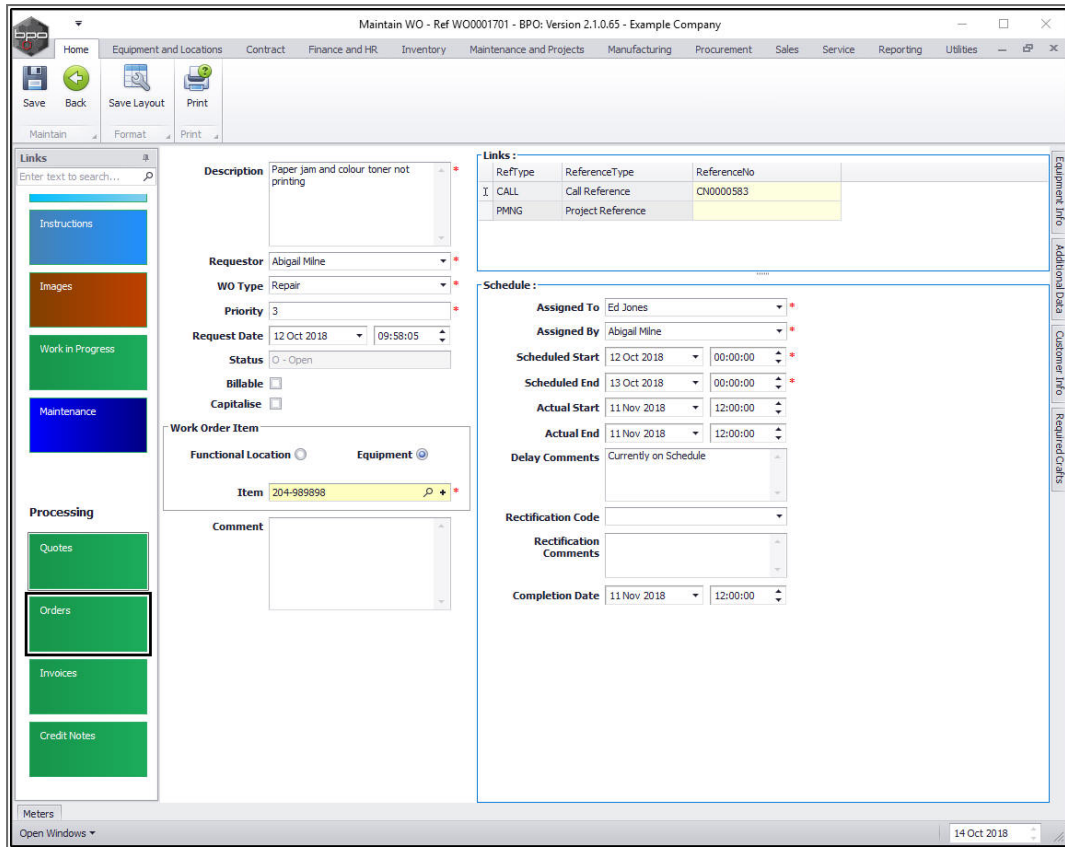
Drag a column header here to group by that column

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Status
QT0000207	HOP001	Hope Works	QAB11/10/2018	1 398.40	ZAR	1.00	15.00	12 Oct 2018	Abigail Mline	Call out to service printer exchange machine.	N	A

Open Windows | 14 Oct 2018

## Orders

- In the **Maintain WO - Ref [ ]** screen, click on the **Orders** tile.



The **Sales Orders for Work Order [ ]** screen will be displayed.

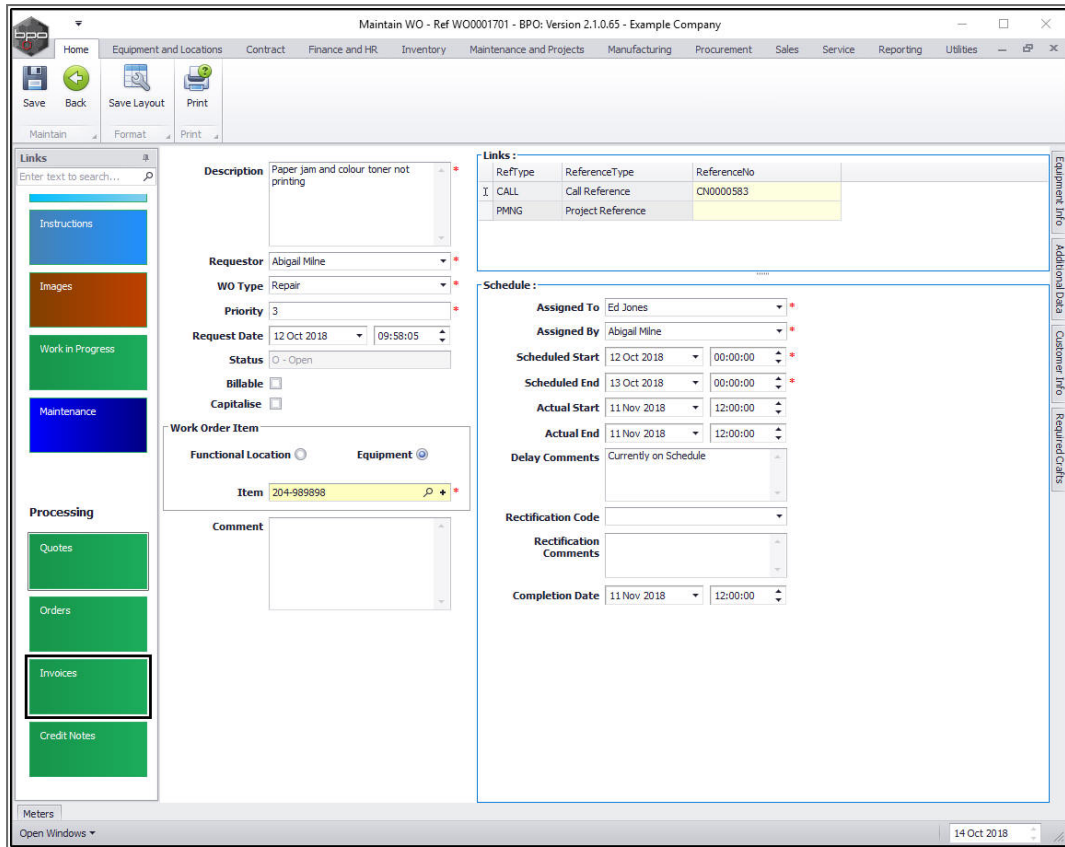
- Here you can view a list of the **sales orders** linked to the selected work order.
- In this screen you can **Add, Edit, Delete** or **View** sales quotes as required. You can also **Create an invoice, Create a New Deal Sale** or **Project** and **Add Items** to the linked work order as required.

OrderNo	CustomerCode	CustomerName	DeptCode	DeptName	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	SalesmanName	Comments	Status
OR0000239	HOP001	Hope Works	Tech	Technical	New order	OAB11/10/2018	517.50 ZAR		1.00	15.00	12 Oct 2018	Abigail Milne		A

## Invoices

- In the **Maintain WO - Ref [ ]** screen, click on the **Invoices** tile.





The **Sales Invoices for Work Order [ ]** screen will be displayed.

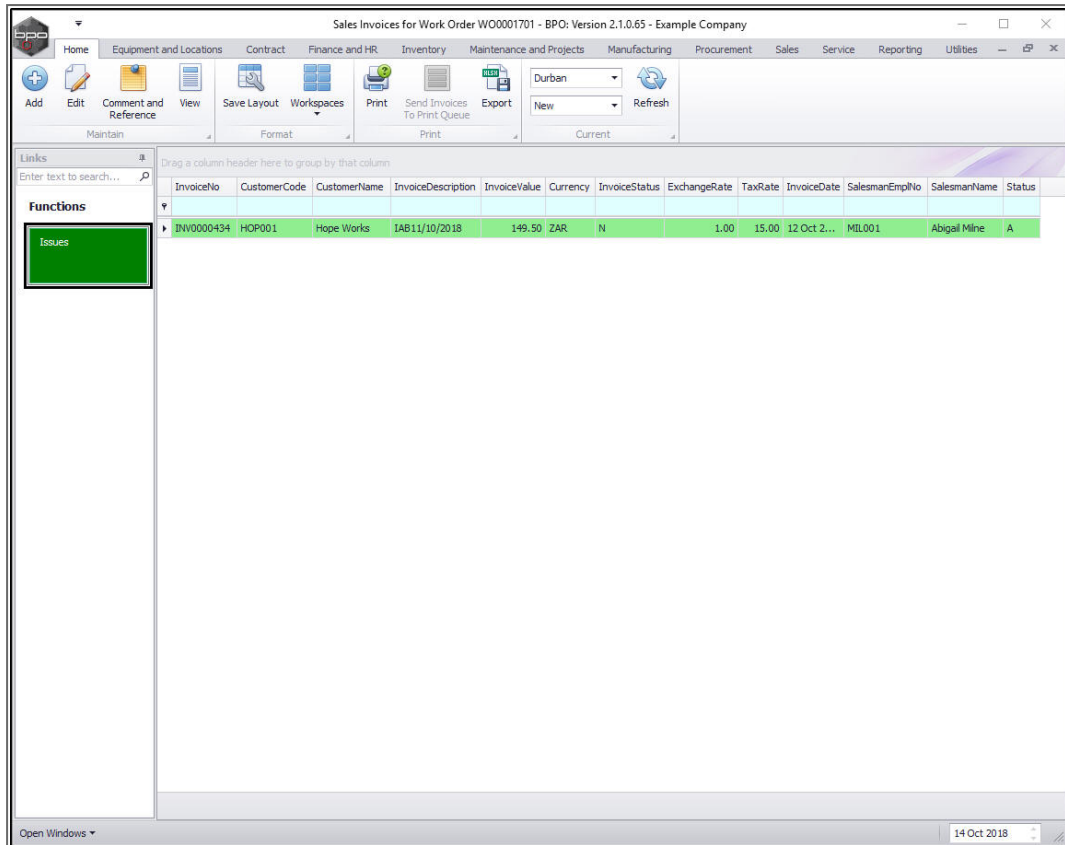
- Here you can view a list of the **sales invoices** linked to the selected work order.
- In this screen you can **Add, Edit**, record **Comments** and **References** and **View** sales invoices as required.

The screenshot displays a software application window titled "Sales Invoices for Work Order WO0001701 - BPO: Version 2.1.0.65 - Example Company". The interface includes a top navigation bar with tabs for Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with icons for Add, Edit, Comment and Reference, View, Save Layout, Workspaces, Print, Send Invoices To Print Queue, and Export. A dropdown menu is open, showing "Durban" and "New" options, with a "Refresh" button. The main area features a table with the following columns: InvoiceNo, CustomerCode, CustomerName, InvoiceDescription, InvoiceValue, Currency, InvoiceStatus, ExchangeRate, TaxRate, InvoiceDate, SalesmanEmpNo, SalesmanName, and Status. A single row of data is visible, with values: INV0000434, HOP001, Hope Works, IAB11/10/2018, 149.50, ZAR, N, 1.00, 15.00, 12 Oct 2..., MTL001, Abigail Milne, and A. On the left side, there is a sidebar with a search bar and a "Functions" section containing a green "Issues" tile. The bottom status bar shows "Open Windows" and the date "14 Oct 2018".

InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	InvoiceStatus	ExchangeRate	TaxRate	InvoiceDate	SalesmanEmpNo	SalesmanName	Status
INV0000434	HOP001	Hope Works	IAB11/10/2018	149.50	ZAR	N	1.00	15.00	12 Oct 2...	MTL001	Abigail Milne	A

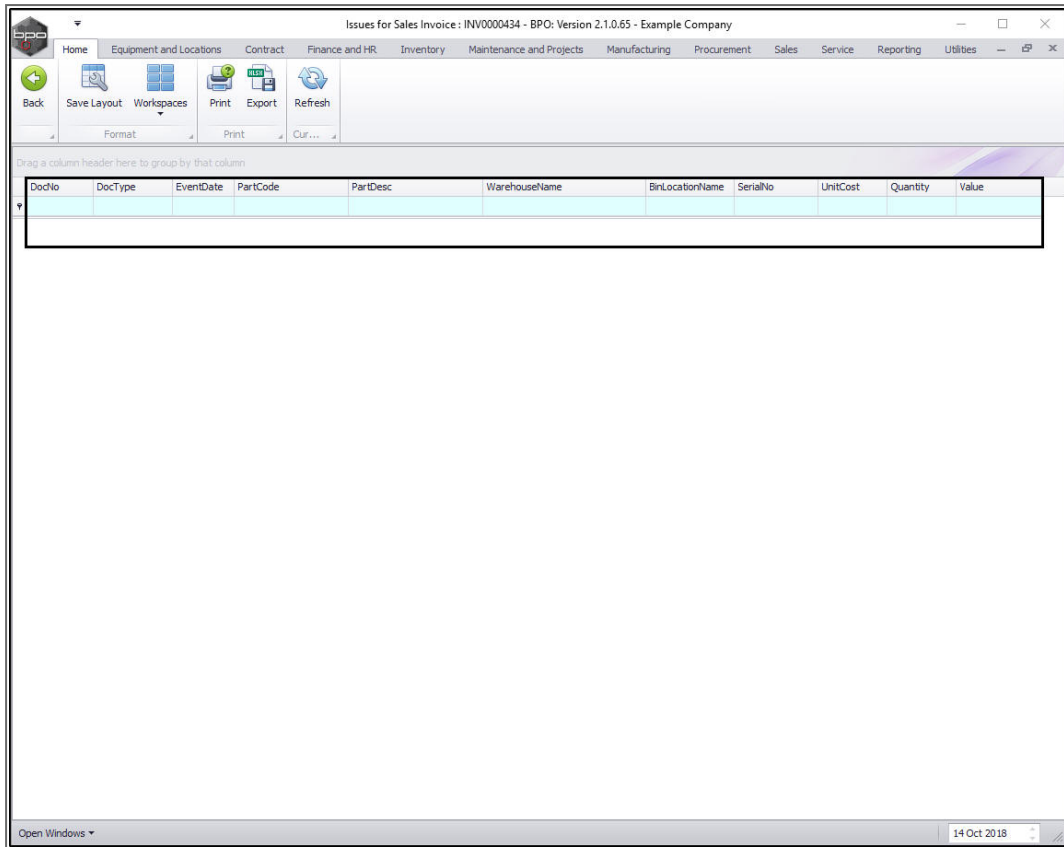
## Issues

- Click on the **Issues** tile in this screen.



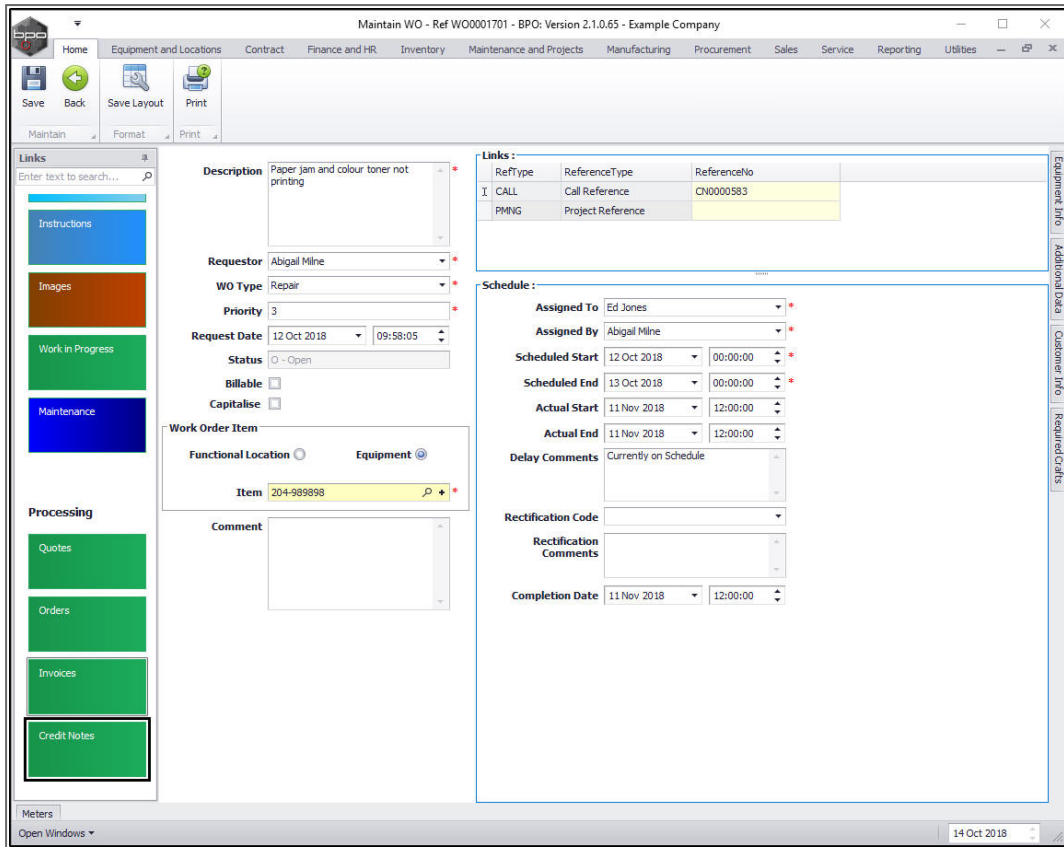
The **Issues for Sales Invoice: [ ]** screen will be displayed.

- If there are any **part issues** linked to the selected sales invoice, they will be listed in this screen.



## Credit Notes

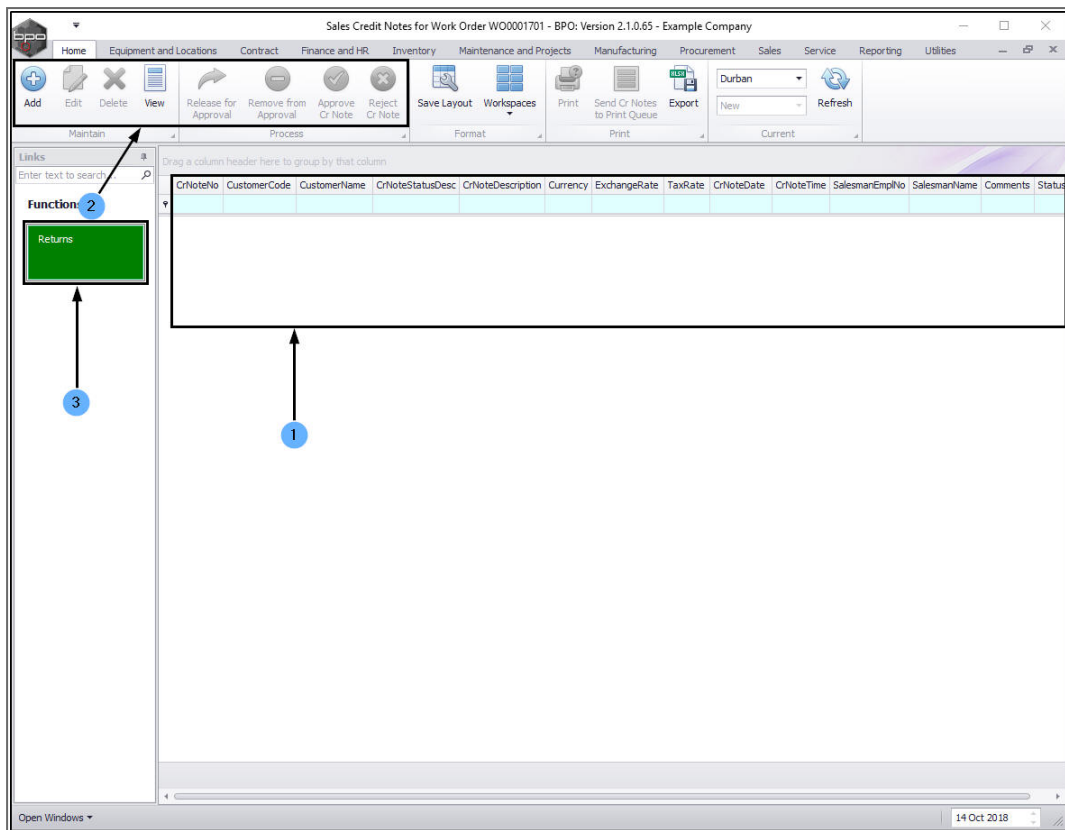
- In the **Maintain WO - Ref [ ]** screen, click on the **Credit Notes** tile.



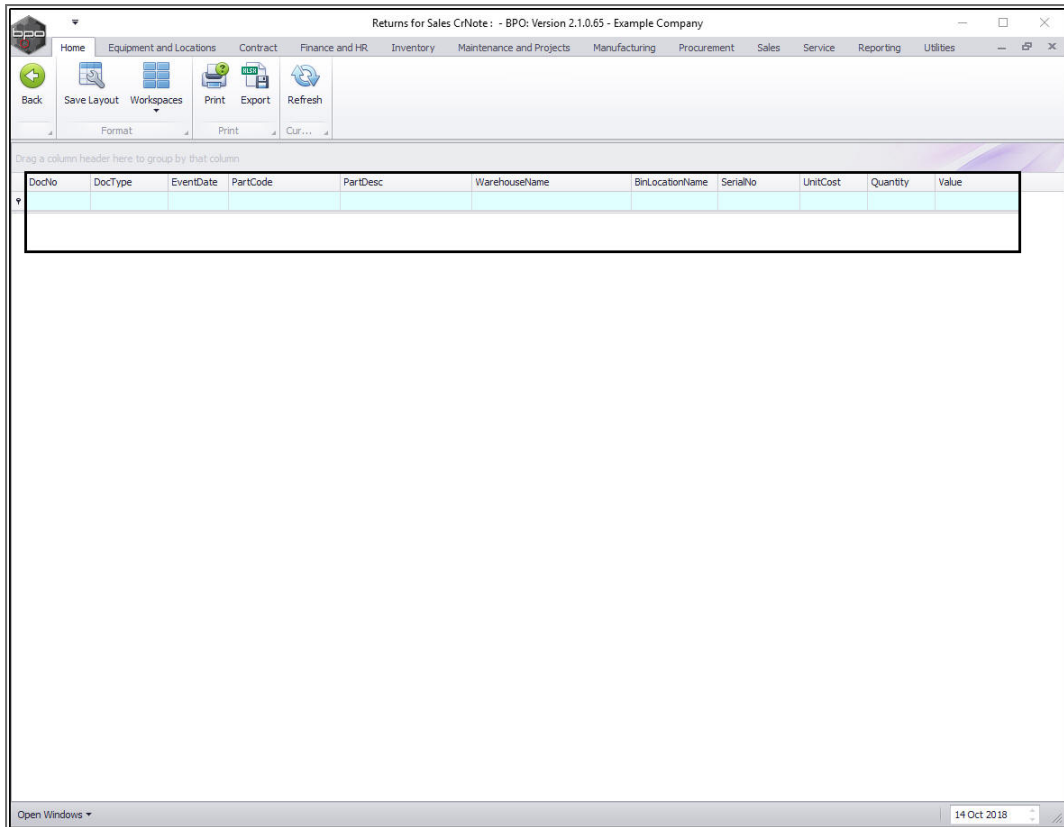
1. The **Sales Credit Notes for Work Order [ ]** screen will be displayed.
2. Here you can **Add, Edit, Delete, View, Release for Approval, Remove from Approval, Approve** or **Reject** the selected credit note.

## Returns

- Click on the **Returns** tile



- The **Returns for Sales Cr Note** screen will be displayed.
- If there is a **part return** linked to the selected sales credit note, then this will be listed in this screen.



## THE WORK REQUESTS FRAME

- Go back to the **My Work** Listing screen and click on the **Work Requests** tab
- A list of **work requests** assigned to this specific employee will be displayed.
  - Note: A work request can be raised if additional work is required, which can be viewed and approved / rejected by a supervisor or manager and will then become a work order.

My Work - BPO: Version 2.1.0.65 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Complete | Start | Save Layout | Workspaces | Print Call Report | Print WO | Service History | Project Progress | View Customer | Export | Refresh

Processing | Format | Print | View | Export | Current

Work Orders | **Work Requests**

Drag a column header here to group by that column

WRCode	Description	WOType	WOTypeDesc	Status	Priority	AssigneeNumber	EmployeeNumber	RequestorType	RequestDate	RequestTime	ScheduledStartDate	ScheduledFin
WR000054	New drum requested to complete repair requirements.	DR	Default	O	2	ML001	SHA001	2	22 May 2018	04:10:24	22 May 2018	22 May 2018
WR000057	Service Request	SERV		O	2	ML001	SHA001	1	10 Jul 2018	13:23:23	10 Jul 2018	10 Jul 2018

Open Windows | 14 Oct 2018

BPO.MNU.073