

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

# **COMPANION APPS**

## INTRODUCTION TO BPO AUTO CALL INVOICE SERVICE

(RSI\_AutoInvoiceService)

#### **Requirements**

- RSI v1.24.0.5 or later.
- The call must either originate from a Sales Order with a valid salesman, or be a service call with a technician linked.
- For the call to be review by the service for auto invoicing, the call and underlying work orders(s) should be set to status 'Complete'.
- Can be used in conjunction with:
  - RSI\_AutoComplete
  - RSI\_CloseCallService applications.

Remember that if you use RSI\_CloseCallService: the following is required:

- the BPO\_PostingEngine must be installed and configured
- Cannot be used with 'Enforce Error Code on Call Closure' set to Yes
- If the company configuration 'ReadingRequired' is set to yes – a call or its underlying work order(s) cannot be closed without adding a meter reading to the call or underlying work order.

#### Introduction



BPO\_AutoCallInvoice attempts to automatically invoice items for completed calls. A Daily Scheduled Task is created during installation to run BPO\_ AutoCallInvoice at 2:00am every day. Any completed calls that cannot be invoiced are added to a tsv file that can be opened in Microsoft Excel. This exception list includes call summary information and the reason the call cannot be invoiced so that it can be resolved for invoicing.

Completed calls that have no outstanding items and have billable items will be invoiced. The invoice status will be set to 'New' and will need to be printed and emailed to the client as required.

A message will be emailed to the selected person in the AutoCallInvoice static data file, for calls that have items outstanding, such as un-actioned Part Requests etc.

## **INSTALLATION**

- Double click on the 'BPO\_AutoCallInvoice' install file.
  - Note: Check that you have the latest version.



- The Installation Wizard will open.
- Click on Next.



🔀 BPO Auto Call Invoice V2		-		×
Welcome to the BPO Au Wizard	to Call Invo	ice V2 Setup		5
The installer will guide you through the sto computer.	eps required to insta	ill BPO Auto Call Invo	ice V2 or	n your
WARNING: This computer program is pro Unauthorized duplication or distribution of or criminal penalties, and will be prosecut	f this program, or an	y portion of it, may re:	sult in sev	
	Cancel	< Back	Ne	ext >

1. The default location for installation is:

### C:\Program Files (x86)\CO3 Technologies (Pty) LTD\BPOAutoCallInvoice\

It is recommended that you keep this default location. Keeping a standard will make upgrades easier.

- 2. Ensure that **Everyone** is selected for the install.
- 3. Click on the **Next** button.



BPO Auto Call Invoice V2	-23	'n	×
Select Installation Folder			5
The installer will install BPO Auto Call Invoice V2 to the following folder. To install in this folder, click "Next". To install to a different folder, enter it be	low or (	click "Bro	wse''.
<u>F</u> older:	-		2
C:\Program Files (x86)\CO3 Technologies (Pty) LTD\BPOAutoCallInv		Browse	
		Disk Cost	
Install BPO Auto Call Invoice V2 for yourself, or for anyone who uses this Everyone Just me	comput	er:	3
Cancel < Back		Nex	:t >

- 1. The installer will ask you to **Confirm Installation**.
- 2. Click on **Next** to start the installation.



BPO Auto Call Invoice V2	 in i	$\times$
Confirm Installation	Ę	
The installer is ready to install BPO Auto Call Invoice V2 on your computer.		
Click "Next" to start the installation.		
	2	
Cancel < Back	Next >	

- 1. The BPO Auto Call Invoice installation will begin.
- 2. Wait for it to be completed.



BPO Auto Call Invoice V2	-	×
Installing BPO Auto Call Invoice V2 -1		5
BPO Auto Call Invoice V2 is being installed.		
Please wait		
1		
2		
Cancel < Back		Nexd >

- 1. Once Installation is **Complete**.
- 2. Click on Close.



BPO Auto Call Invoice V2	-		×
Installation Complete -1		4	
BPO Auto Call Invoice V2 has been successfully installed.			
Click "Close" to exit.			
Please use Windows Update to check for any critical updates to the .NET	Framew	ork.	
Cancel < Back		Close	

## **ENVIRONMENT CONFIGURATION**

1. In your File Explorer, search for the following file location:

C:\Program Files (x86)\CO3 Technologies (Pty) LTD\BPOAutoCallInvoice

2. Right click on the **Envn.xml** file.



### **BPO Auto Invoice Service**

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File Home Share View	1			~ 🤇
Pin to Quick Copy Paste access	Move Copy Delete Bename New	Easy access + Propert	Edit 🔡 Se	lect all lect none vert selection Select
	)       CO3 Technologies (Pty) LTD      BPOAutoCall		Search BPOAutoCallIn	a a tradi
Windows (C:)	Name	Date modified	Туре	Size
🔮 Documents 🛛 🖈	DevExpress.XtraPrinting.v14.2.dll	16-07-2018 12:17 PM	Application exten	722 K
BPO RSI Completed Work	DevExpress.XtraPrinting.v17.2.dll	16-07-2018 12:17 PM	Application exten	1,061 K
CRM.000.012_Basics_Cases	DevExpress.XtraReports.v14.2.dll	16-07-2018 12:17 PM	Application exten	1,424 K
CRM For Review	DevExpress.XtraReports.v14.2.Extensions	16-07-2018 12:17 PM	Application exten	2,616 K
Documents	DevExpress.XtraRichEdit.v14.2.dll	16-07-2018 12:17 PM	Application exten	1,956 K
Documents	DevExpress.XtraRichEdit.v17.2.dll	16-07-2018 12:17 PM	Application exten	2,182 K
🔜 Desktop	DevExpress.XtraRichEdit.v17.2.Extensions	16-07-2018 12:17 PM	Application exten	154 K
CO3 Technologies (Pty)Ltd	DevExpress.XtraTreeList.v14.2.dll	16-07-2018 12:17 PM	Application exten	1,017 K
abigailm	DevExpress.XtraTreeList.v17.2.dll	16-07-2018 12:17 PM	Application exten	1,424 K
android	DevExpress.XtraVerticalGrid.v14.2.dll	16-07-2018 12:17 PM	Application exten	671 K
dotnet	DevExpress.XtraWizard.v14.2.dll	16-07-2018 12:17 PM	Application exten	87 K
	dxSalesInvoice.DLL	16-07-2018 12:17 PM	Application exten	<mark>4</mark> ,123 K
	Rentities.DLL	16-07-2018 12:17 PM	Application exten	4,397 K
AppData	Envn.xml	16-07-2018 12:17 PM	XML Document	5 K
📥 CO3 Technologies (Pty)Ltd	Microsoft.Win32.TaskScheduler.DLL	04-07-2018 11:36 AM	Application exten	304 K
Contacts	NetReports.DLL	16-07-2018 12:17 PM	Application exten	3,967 K
Deskton ¥	<			

- 1. The File menu will open.
- 2. Select to Edit with Notepad++.

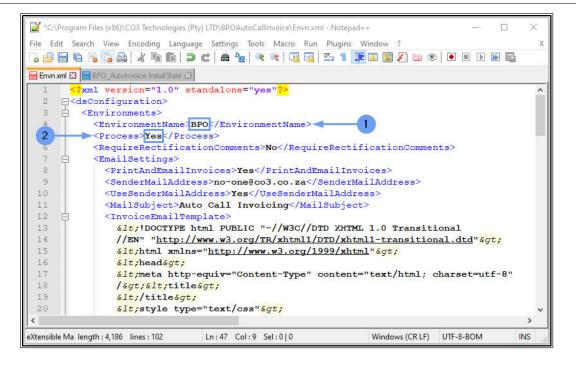


Pin to Quick Copy Paste access Cipboard	cut Move Copy to - Organise 1	F Facy access V Fdit	Select all Select none lection
<ul> <li></li></ul>	6) > CO3 Technologies (Pty) LTD > BPOAutoC Name DevExpress.XtraPrinting.v14.2.dll DevExpress.XtraPrinting.v17.2.dll DevExpress.XtraReports.v14.2.dll DevExpress.XtraReports.v14.2.dll DevExpress.XtraRichEdit.v14.2.dll DevExpress.XtraRichEdit.v17.2.dll DevExpress.XtraRichEdit.v17.2.dll DevExpress.XtraTreeList.v14.2.dll DevExpress.XtraTreeList.v14.2.dll DevExpress.XtraTreeList.v14.2.dll DevExpress.XtraTreeList.v14.2.dll DevExpress.XtraRichEdit.v17.2.dll DevExpress.XtraTreeList.v14.2.dll DevExpress.XtraWeticalGrid.v14.2.dll DevExpress.XtraWizard.v14.2.dll DevExpress.XtraWizard.v14.2.dll DevExpress.XtraWizard.v14.2.dll DevExpress.XtraWizard.v14.2.dll DevExpress.XtraWizard.v14.2.dll DevExpress.XtraWizard.v14.2.dll	7-Zip ✓ Edit with Notepad++ ↔ Scan with Windows Defender ↔ Share Open with Restore previous versions Send to	> 722 K 1,061 K > 1,424 K 2,616 K 2,182 K 1,956 K 2,182 K 1,54 K 1,017 K 1,424 K 671 K 87 K 4,123 K 4,397 K
<ul> <li>Searches</li> <li>Tracing</li> <li>Videos</li> </ul>		16-07-2018         12:17 PM         XML Document           04-07-2018         11:36 AM         Application exten           16-07-2018         12:17 PM         Application exten	5 K 304 K

The xml file will open in Notepad++.

- 1. Type in the **Environment Name** as defined for this database, in the Service Manager.
- 2. Select Yes to Process the selected environment.



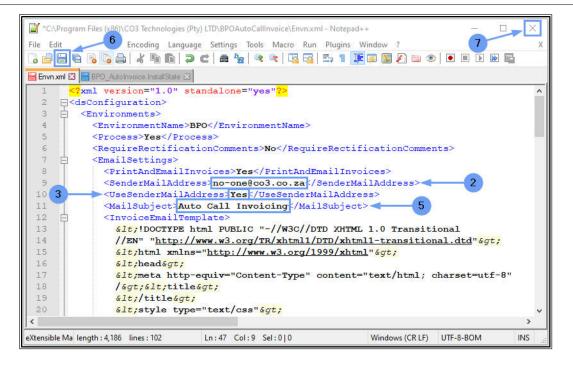


## SERVICE / STATIC DATA CONFIGURATION

In order to email the Invoice to your client, you need configure these email settings:

- 1. SMTP Server: Type your company's SMTP server details ? CHECK ?
- 2. **Sender Mail Address:** Type in the email address that should be used for the **Sent From** address.
- 3. Use Sender Mail Address: Select Yes to display the Sent From address.
- 4. Copy To Address: Type in the email address(es) that should be copied in on the email when it is sent. ? CHECK ?
- 5. Mail Subject and Mail Body: These are populated with defaults, but you can type in any changes, as required. ? CHECK ?
- 6. When you have finished editing the details, click on **Save**.
- 7. Close Notepad++.

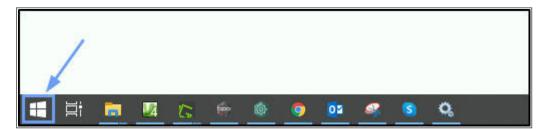




## **CONFIGURED SCHEDULED TASK**

Once you have done the service configuration, you need to set up a Scheduled Task in Windows. Ensure that the service runs whether user is logged in or not and runs with Administrator rights. Test the Scheduled Task to ensure it is configured and running correctly.

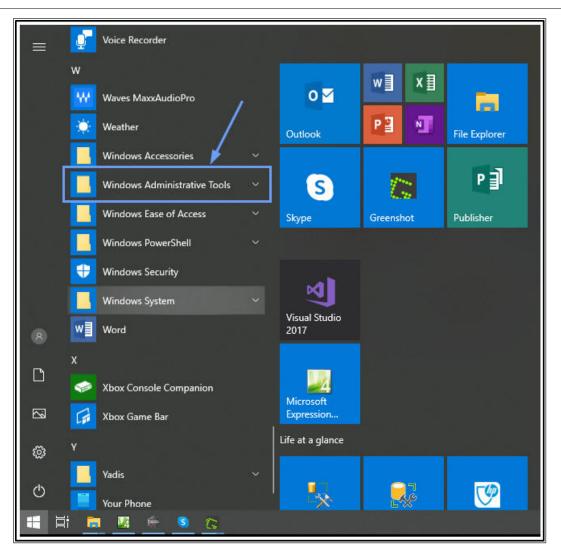
• Select the **Windows** icon in your taskbar.



• In the Windows pop up menu, search for and select Windows Administrative Tools.



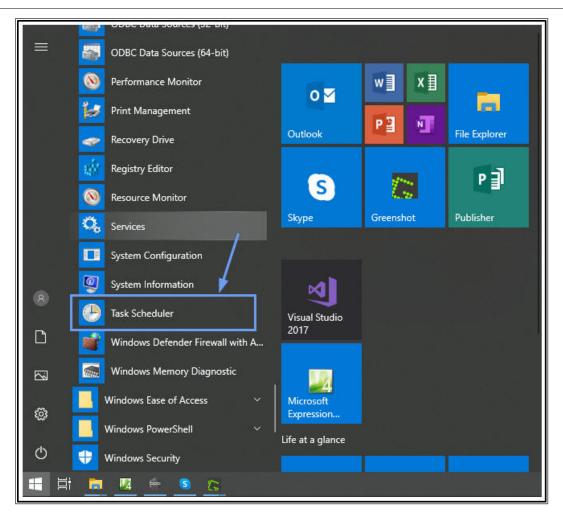
#### **BPO Auto Invoice Service**



• In the Tools pop up menu, search for and select Task Scheduler.

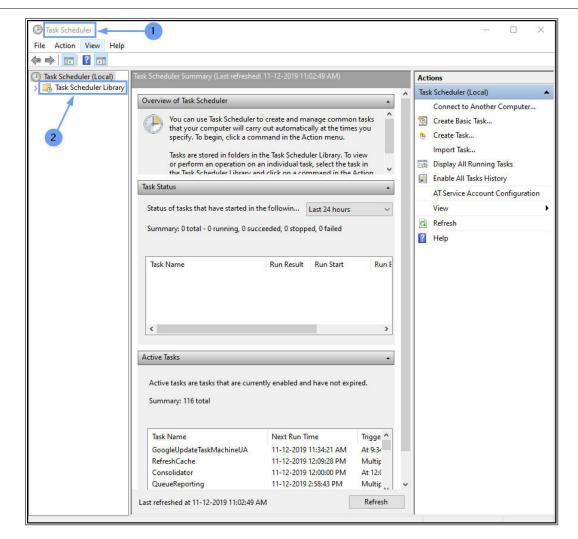


#### **BPO Auto Invoice Service**



- 1. The Task Scheduler screen will open.
- 2. Click on Task Scheduler library.





- 1. Select BPO\_AutoCallInvoice in the Name panel.
- 2. Ensure that the service runs whether user is logged in or not and that it
- 3. Runs with Administrator rights.
- 4. Test the Scheduled Task to ensure it is configured and running correctly? CHECK ?.



Task Scheduler		– 🗆 X
File Action View Help		
🗢 🄿 🖄 📰 🛛		
● Task Scheduler (Local) > → Task Scheduler Library	Name       Status       Triggers         ④ (3E10CA5A-4AEB-4618-A577-AA77363F8CD5)       Ready       When the task is created o         ● Adobe Acrobat Update Task       ■       Ready       When the task is created o         ● Dell SupportAssistAgent AutoUpdate       ■       Ready       Multiple triggers defined         ● GoogleUpdateTaskMachineCore       ■       Ready       Multiple triggers defined         ● GoogleUpdateTaskMachineUA       ■       Ready       Multiple triggers defined         ● HPJumpStattLaunch       ■       Ready       Multiple triggers defined         ● HPJumpStattLaunch       ■       Ready       At 5:07 PM on of any user         ● OneDrive Standalone Update Task <s-1-5-21< td="">       Ready       At 3:45 PM every day - Trig         ●       □       ■       Adobe Acrobat Update Task         Location:      </s-1-5-21<>	Actions         Task Scheduler Library         Image: Create Basic Task         Create Task         Create Task         Import Task         Display All Running Tasks         Enable All Tasks History         New Folder         View         Refresh         Help         Selected Item         End         Disable         Export         Properties         Delete         Help

### **EXAMPLE EMAIL**

A message will be emailed to the selected person in the BPO\_ AutoCallInvoice static data file, for calls that have items outstanding, such as un-actioned Part Requests, etc.



Please note that the auto invoice process was unable to generate an invoice for call CN0000144.

Please attend to this call so that it can be invoiced.

There are still open part requests which need to be actioned. Please action these items before invoicing.

Thank you

Processing Service

Please note this is an automated system generated email.

#### CAP.003.001

Help v2024.5.0.7/1.0 - Pg 16 - Printed: 04/07/2024

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