



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

SERVICE

MY WORK – VIEW CUSTOMER INFO AND CUSTOMER NOTES

Ribbon Access: Service > My Work



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **view** the related **customer information**.
- Click on **Edit**.

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

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DepName	Sc
WO0001592	RSI V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HCP001	Hope Works	Technical	15
WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	CH0000566	Toner required ...	CALL	HCP001	Hope Works	Technical	22
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing							26
WO0001662	Machine service required	Durban	O	SERV								15
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15

Open Windows | 17 May 2018

The **Maintain WO** screen will be displayed.

- Click on the **Customer Info** tab on the right hand side of the screen.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company
_ □ X

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

Save Back Save Layout Print

Maintain Format Print

Links

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Meters
Open Windows

Description Toner check and clean required

Requestor Abigail Mine

WO Type Repair

Priority 2

Request Date 18 May 2018 09:42:59

Status Open

Billable

Capitalise

Work Order Item

Functional Location
Equipment

Item 2020-103053

Comment Check Colour Toner - not printing effectively

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CH0000966
PMVG	Project Reference	

Schedule
Assigned To Abigail Mine
Assigned By Abigail Mine
Scheduled Start 22 May 2018 00:00:00
Scheduled End 22 May 2018 02:00:00
Actual Start 17 Jun 2018 00:00:00
Actual End 17 Jun 2018 00:00:00
Delay Comments Currently on Schedule
Rectification Code
Rectification Comments
Completion Date 17 Jun 2018 00:00:00

Meters
17 May 2018

- The **Customer Info** docking panel will be expanded.
- Here you can view **Customer Info** details and any **Customer Notes**, if recorded.

The screenshot displays the CO3 software interface for viewing a Work Order (WO) and its associated Customer Information and Notes. The window title is "Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company".

Work Order Form Fields:

- Description:** Toner check and clean required
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 18 May 2018 09:42:59
- Status:** 0 - Open
- Billable:**
- Capitalise:**

Work Order Item:

- Functional Location:** **Equipment:**
- Item:** 2020-103053
- Comment:** Check Colour Toner - not printing effectively

Customer Info Panel (Expanded):

- Customer Code:** HCP001 - Hope Works
- Tel No:** 031 123 4567
- Contact No.:**
- Account Code:**
- Status:** A -
- VAT No:** 987654321
- Hold Reason:**
- Address:** Plot 91 Leaf Road Forest Hills New Town Durban South 1234
- Is Debtor:**

Customer Notes Table:

Notes	NoteDate	NoteTime	Fullname
Call customer to confirm order	09 Feb 2017	11:21:51	Judith Mudzengi
Existing third party contract pending	18 Apr 2016	12:09:00	Bianca Du Toit
Check toner yield	04 Aug 2014	00:00:00	Belinda Sharman

The interface includes a sidebar with navigation options (Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, Expenses) and a top menu with various system functions. The date in the bottom right corner is 17 May 2018.

- If you wish to see more customer information, go back to the **My Work** listing screen.
- Click on the **row selector** in front of the **work order** where you wish to **view** the **customer details**.
- Click on **View Customer**.
- Follow the instructions to [View the Customer](#).

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	WCodeDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	Sc	
WO0001592	RSI V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	15	
<input checked="" type="checkbox"/>	WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	CH0000566	Toner required ...	CALL	HOP001	Hope Works	Technical	22
<input type="checkbox"/>	WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing						26	
<input checked="" type="checkbox"/>	WO0001662	Machine service required	Durban	O	SERV							15	
<input checked="" type="checkbox"/>	WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs						15	

Open Windows | 17 May 2018

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