

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

# SERVICE

## **CALLS - NOTES**

**Note** that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility<sup>1</sup>. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

Call notes can be used to capture any additional information for a call.

#### Ribbon Select Service > Calls



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Durban	E CN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
New	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
<ul> <li>In Progress</li> </ul>	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num		Change Request			sin123		
() Hold	⊞ CN0000996	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - C00000054	DR	Select Call Type					
O AI	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123		_
<ul> <li>In Progress</li> <li>Hold</li> </ul>	CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin 123		
Pending	EE CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q AI	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance		11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Anaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
🕑 Hold	⊞ CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
All     Idoemfontein	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
New	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
<ul> <li>New</li> <li>In Progress</li> </ul>	⊞ CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
() Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	SathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DAST.	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	SathSinNaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
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	Count: 386													

• The **Call Listing** screen will be displayed.

<sup>1</sup>BPO2 v2.5.1.3 or higher



- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

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ormation	EE CN0001003	Young Bectric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
New	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			sin123		
In Progress	E CN0000996	Hope Works (Pty) Ltd					ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Hold     Pending	E CN0000992	Top Vehicle Hire		Amaiting Acceptance	Daniel Balcowen	14:09:17	Loan machine for temporary high volume printing requirement	STRY	Service			TOP 12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/2022			16:38:15		DR	Select Call Type					
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Hold	E CN0000985	Hope Works (Pty) Ltd		UnAssigned		16:09:13		LIPG	Upprade			20-98765		
Pending	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000.		
Complete	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
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New	E CN0000976	Young Electric				11:24:39	test with site manager email entered test another call email	ADM	Administration Administration					
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Pending     Complete	E CN0000971	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	574	Scheduled Maintenance				Checkers Centre - Hildrest	
O Al	EE CN0000970	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
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() In Progress	E CN0000967	Westwood Dynamic		UnAssigned		03:00:00		SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
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Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	SathSinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
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	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000936	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
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• Select the **Call** you wish to work with.

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Durban	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Cal Type			19-12/1202		
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O Pretoria	E CN0000988	Young Electric	03/06/2022			05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O New	E CN0000987	Young Electric	06/06/2022			05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress     Hold	■ CN0000986	Young Electric	07/06/2022			05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin 123		
Pending		Hope Works (Pty) Ltd	10/06/2022			16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
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Cape Town	E CN0000982	Young Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
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• Click on the **Edit** button.



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	EE CN0000960	Westwood Dynamic	18/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000959	Westwood Dynamic Westwood Dynamic	04/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000957	Westwood Dynamic	27/09/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000956	Westwood Dynamic	20/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019			03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	III cussosses						nadmassaux nadarra na statatarra	1000					Phone Product Collector	
	Count: 38	0												

- The **Call maintenance: Call ref. -** [call ref number] screen will be displayed.
- Call maintenance : Call ref. CN0005285 BPO: Version 2.5.0.8 Example Company v2.5.0.8 \_ **•** × \$ Ŧ Home Equip ns Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement ..... × 💾 🔇 🚱 🚱 🚣 📲 🐯 🚩 P 2 2 ۹ Close Complete Assign Hold Pending Release Reinstate Save Back Save Layout Workspaces Print Note Print 6 Relates To : -Links 4 Equipn Customer Hope Works (Pty) Ltd P … + \* ReferenceType Serial No ReferenceNo Contact Henry Rowe ہ ... م ment Info Prior Call Reference Call Request Reference Functions Contact No. 031 555 1234 Address Plot 91 Leaf Road Leaf Hills Pink Town Durban South *...* م Contract No Customer Info Location Forest Hills Centre Project Reference Quote Reference • Call Type Installation Invoice Reference Order Reference Error Code • SLAs Description Tier - Commercial Tier Test User Defined Call Date Time 16/09/2021 ▼ 08:00:00 ÷ Priority 2 🗘 \* Prior Calls : -Description Tier - Commercial Tier Test 
   CallDate
   CallTime

   16/10/2021
   08:00:00

   16/09/2021
   08:00:00

   17/08/2021
   08:00:00
   **SLA** 0.00 CalReference CN0005291 . Date Required 16/09/2021 -CN0005285 CN0005277 Order No 
   17/07/2021
   08:00:00

   17/06/2021
   08:00:00

   18/05/2021
   08:00:00
   CN0005269 Logged By JulandaK CN0005260 CN0005255 Tier - Commercial Tier Test Status N - New 
   17/04/2021
   08:00:00
   Tier - Commercial Tier Test

   17/02/2021
   08:00:00
   Tier - Commercial Tier Test

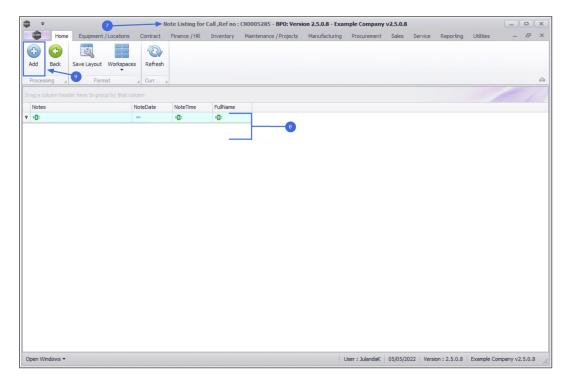
   17/02/2021
   08:00:00
   Tier - Commercial Tier Test
   CN0005247 Optional No CN0005241 CN0005233 On Site Info ٠ Meters User : JulandaK 05/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8 Open Wind
- Click on the Notes tile.



- The Note Listing for Call, Ref no: [call ref number] screen will be displayed.
- Any notes that have been created for the call will be listed in the data grid.

## ADD CALL NOTE

• Click on **Add**.



- The Add a new note for Call, Ref no: [call ref number] screen will be displayed.
  - Note: Click in the text box to type the note details related to the call.
  - Note Date / Time: These fields will display the current date and time.
    - Date: Click to type in or use the down arrow to select and alternative date using



the calendar function.

- Time: Click to type in or use the arrow indicators to select an alternative time.
- **Employee:** The person currently adding the note will display in this field. Click on the down arrow to select a different employee.
- When you have finished adding the note details, click on **Save**.

	10	Ado	d a new note fo	or Call, Ref no	: CN0005285 - BPO: Ver	rsion 2.5.0.8 - Exa	ample Compar	ıy v2.5.0.8					
Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales S	Service Re	porting	Utilities	-	₽ X
Save Back													
Process													\$
Note	Meter readings to be se	ent through ev	very Friday after	5 pm	*								
			•		Ψ.								
Note Date / Time		3:18:48	\$										
Employee	Jade Rivers		•										
Open Windows 🕶						L	lser : JulandaK	05/05/2022	Version :	2.5.0.8	Example Cor	npany v2.	5.0.8 //.

- You will return to the updated **Note Listing for Call, Ref no:** screen.
- The Call Note Processing message will confirm that;
  - Note has been added to Call: [call ref number].
- Click on **OK**.



## Calls - Notes

Add Back Processing Format Drag a column header here to group by that column Notes Note	Refresh Curr	Inventory Ma	intenance / Projects	Manufacturing	Procurement	Sales Se	rvice Reporting	Utilities	-	₽ ×
Add     Back     Save Layout     Workspaces       Processing     Format     In       Drag a column header here to group by that column       Notes     Notes	Refresh Curr	a 🗖 c								\$
Drag a column header here to group by that column       Notes       Noted       • noted	teDate NoteTime	a 🗖 c								~
Drag a column header here to group by that column       Notes       Noted       • noted	teDate NoteTime	a 🗖 c								
Notes         Note           •         •         •	teDate NoteTime	a 🗖 c								
9 mile =	8 <b>0</b> 0	a 🗖 c								
<ul> <li>Decentedungs to be serie unough every 05/0;</li> </ul>	13:18:48	Jaue Rivers								
Open Windows +	G	all Notes Processin	ng been added to Call :	OK		050570077	Version : 2.5.0.8	Evanda Cas		

- The note details can now be **viewed** from this screen.
- Click on **Back** to return to the Call maintenance screen.

🗘 🔻 Not	te Listing for Cal	ll ,Ref no : C	N0005285 - BPO: Versi	on 2.5.0.8 - Exan	nple Company	v2.5.0.8				_	
Home Equipment / Locations Contract F	Finance / HR In	nventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ X
Add Back Save Layout Workspaces Refresh											
· · ·											
Processing											$\hat{\sim}$
Drag a column header here to group by that column											
Notes	NoteDate	NoteTime	FullName								
▼ 40:	=	8 🖬 c	REC.								
<ul> <li>Meter readings to be sent through every Friday after 5 pm</li> </ul>	05/05/2022	13:18:48	Jade Rivers	13							
1											
Open Windows 🕶				L	lser : JulandaK	05/05/202	22 Versi	on : 2.5.0.8	Example Co	mpany v2.	5.0.8



Calls - Notes

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