

# SERVICE

## CALLS - ADD TRAVEL

If you want to keep track of travel done by a technician, you can log this on the call.

The travel logged on a call will not be billed.

The system previously used the **Billable** flag in order to invoice travel, however, travel is now billed via **Travel Radii** or **Travel Zones** - which will check the contract / asset configuration to see whether travel should be billed or not.

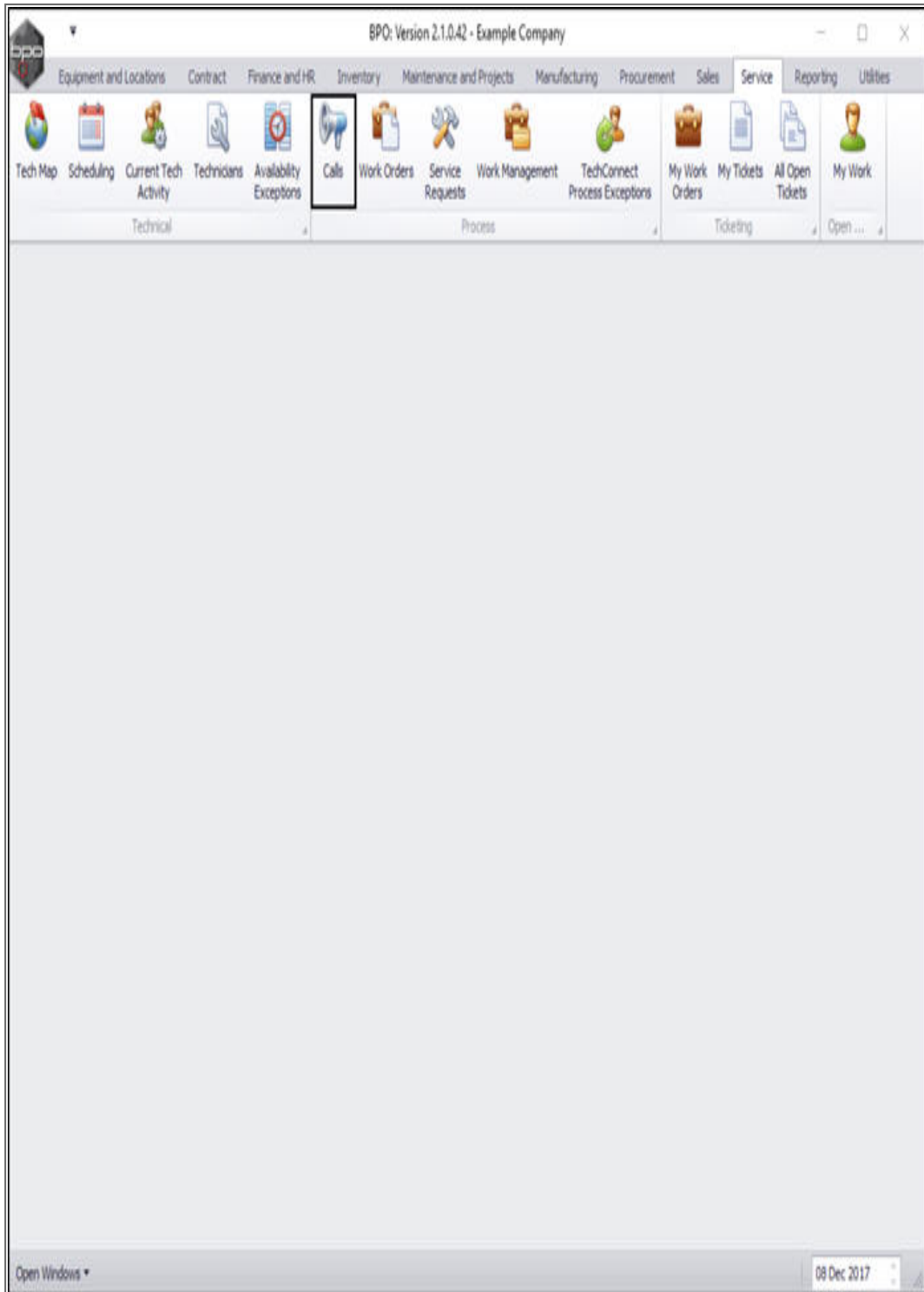
Travel can also be added to an invoice separately. **Travel Radii** must be set up correctly.

If you cannot link travel to the call due to the message: 'No items to select from', then an **Expense Allocation**, **Expense Type**, and Travel Rate must be configured.

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**Ribbon Access:** Service > Calls

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

- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.

Call Listing - BPO: Version 2.1.0.43 - Example Company

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

22 May 2017 Default Save Layout My Call Close Complete Hold Pending Release Print Reports

22 Dec 2017 Refresh My Calls Workspaces Save Filter Start

Find Filter

Information No Of Calls

- Durban 48
  - New 23
  - In Progress 7
  - Hold 3
  - Pending 1
  - Complete 10
  - All 48
- Pretoria 0
  - New 0
  - In Progress 0
  - Hold 0
  - Pending 0
  - Complete 0
  - All 0

CallReference	CalDate	CalTime	Description	CallType	CallTypeDesc	StatusDesc	CalState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throu...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-10
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per ...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	an123
CH0000493	15 Jun 2017	12:28:25	Test OriSte Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INVT	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-8529
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-8529
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		tes0978
CH0000474	25 May 2017	08:40:54	Installation at client site	INVT	Installation	New	UnAssigned		18-3020
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-8529
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

Open Windows 01 Jan 2018

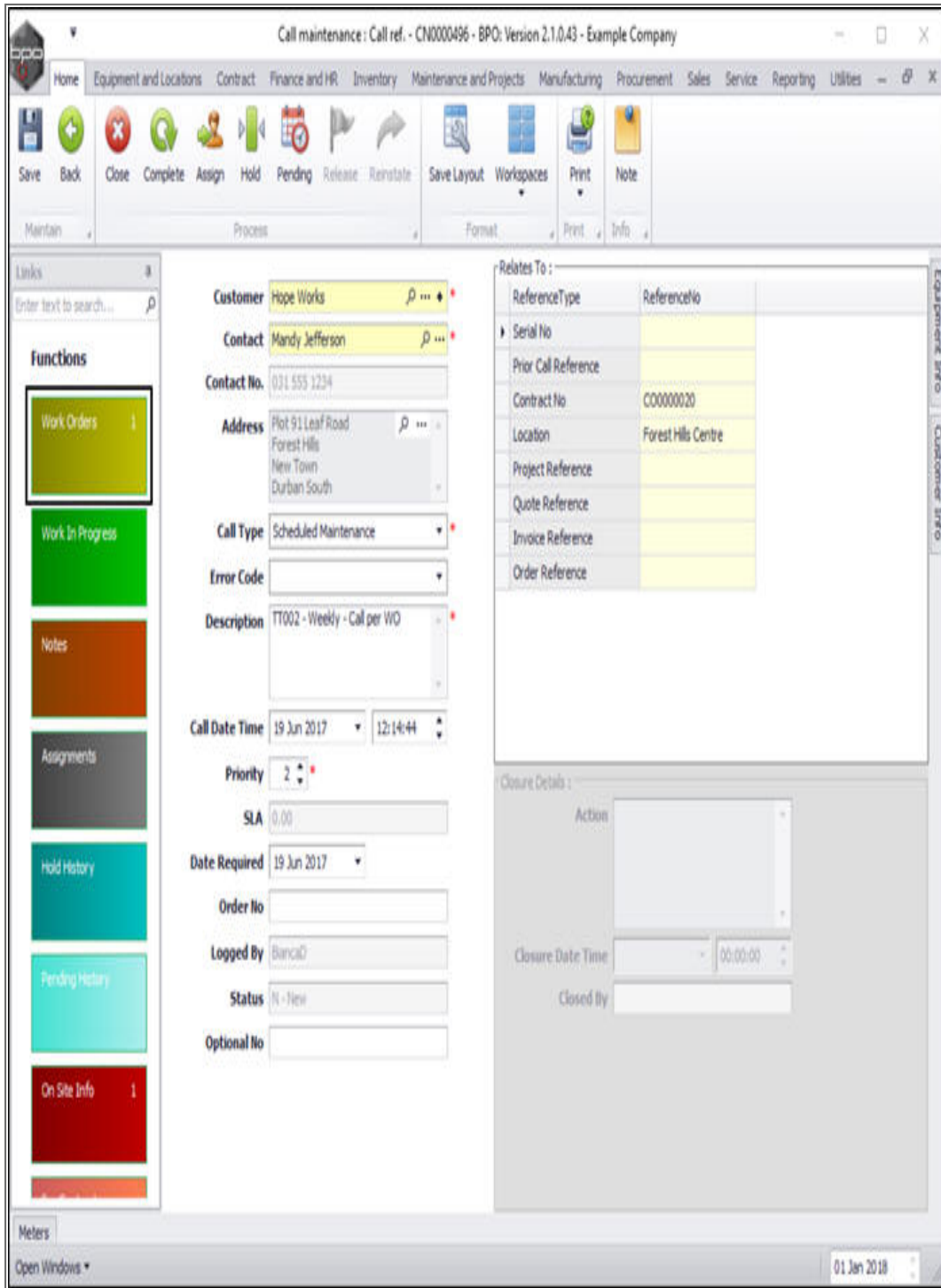
- Click on the **row selector** in front of the **call** you wish to **log travel** to.
- Click on **Edit**.

The screenshot displays the 'Call Listing' application interface. The title bar reads 'Call Listing - BPO: Version 2.1.0.43 - Example Company'. The menu bar includes 'Home', 'Equipment and Locations', 'Contract', 'Finance and HR', 'Inventory', 'Maintenance and Projects', 'Manufacturing', 'Procurement', 'Sales', 'Service', 'Reporting', and 'Utilities'. The toolbar contains various icons, with 'Add' and 'Edit' highlighted. The main area shows a data table with the following columns: CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and SerialNo. The table contains multiple rows of call data. A sidebar on the left shows a filter tree with 'Information' and 'No Of Calls' for various locations and statuses.

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	New Deal Rental Instal...	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-10
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Cal per ...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Cal p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	in123
CH0000493	15 Jun 2017	12:28:25	Test OriNote Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-8529
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-8529
CH0000480	29 May 2017	13:21:39	Test call with a locaton.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		tes0978
CH0000474	25 May 2017	08:40:54	Instalaton at dent site	INST	Installation	New	UnAssigned		18-3020
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-8529
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

The **Call maintenance screen: Call ref. - [ ]** screen will be displayed.

- Click on the **Work Orders** tile.



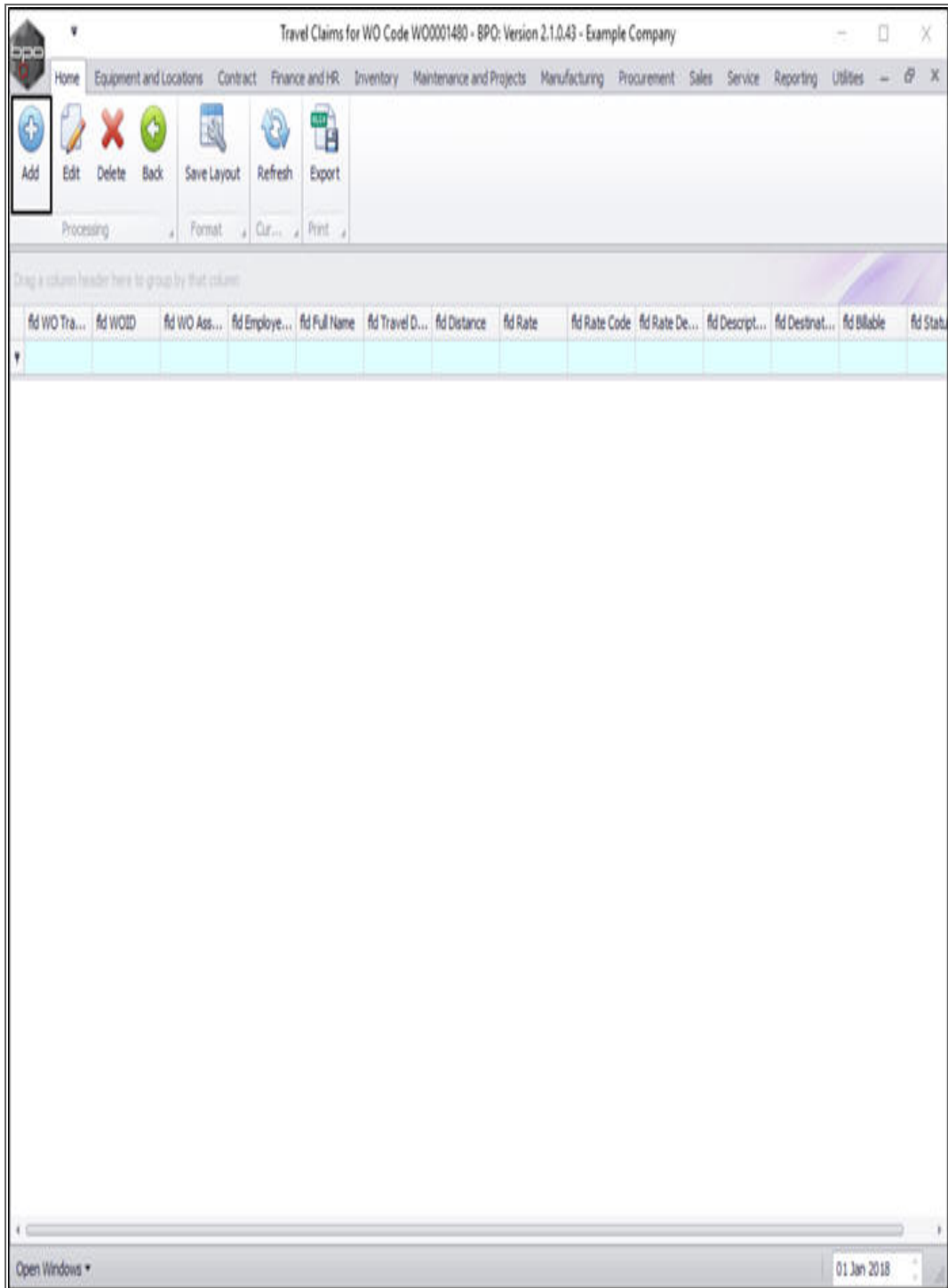
The **Work Orders for Call Ref [ ]** screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **add travel** time.
- Click on the **Travel** tile.

The screenshot shows a software application window titled "Work Orders for Call Ref CN000496 - BPO: Version 2.1.0.43 - 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, View, Close, Complete, Reinstall, Save Layout, Workspaces, Save Filter, Print, Export, Refresh, Find WO, and Reports. A sidebar on the left contains several colored tiles: Parts (green), Loans (orange), Swap Outs (green), Meters (teal), Expenses (light blue), Travel (red, highlighted with a black border), Documents (grey), and Warranties Issued (blue). The main area displays a table with columns: fdWOCODE, fdDescription, fdRequestDate, fdStatus, fdProjectRef, fdProjectDesc, fdWOType, fdPriority, fdInvoiceable, and fdBatchNo. The table contains one row with the following data: fdWOCODE: WO0001480, fdDescription: TT002 - Weekly - Call per WO, fdRequestDate: 19 Jun 2017, fdStatus: 0, fdProjectRef: (empty), fdProjectDesc: (empty), fdWOType: SM, fdPriority: 2, fdInvoiceable: No, and fdBatchNo: (empty). At the bottom left, there is an "Open Windows" dropdown, and at the bottom right, the date "01 Jan 2018" is displayed.

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

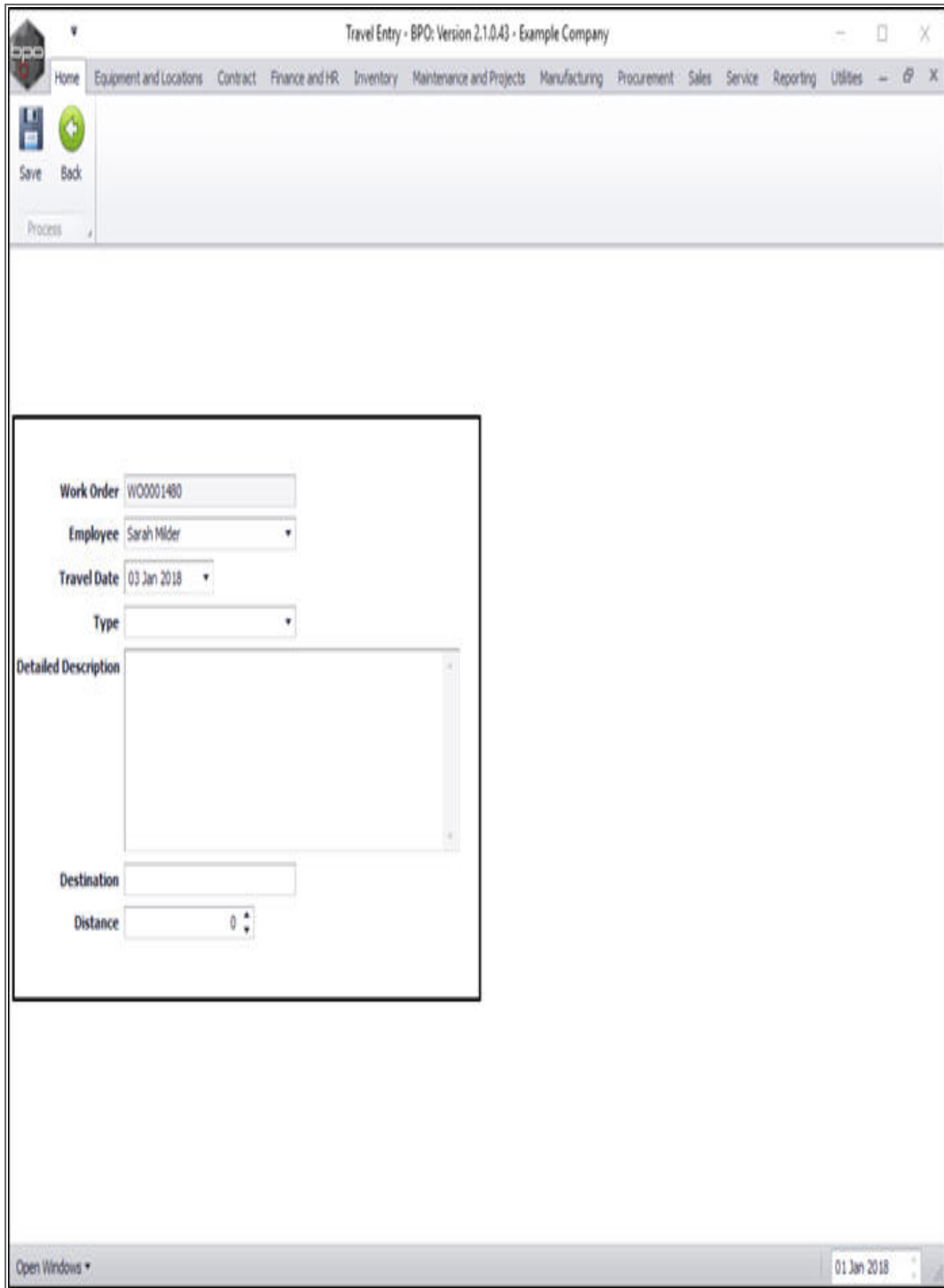
- Click on **Add**.





The **Travel Entry** screen will be displayed.

- **Work Order:** This will auto populate according to the work order initially selected.
- **Employee:** This will auto populate with the name of the person currently logged on to the system but you can click on the drop-down arrow and select an alternative employee from the menu as required.
- **Travel Date:** This will default to the current date. Click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Type:** Click on the drop-down arrow and select the travel rate type e.g. Normal Travel Rate.
- **Detailed Description:** Type in a description / reason for the travel.
- **Destination:** Type in the area travelled to.
- **Distance:** Type in or use the arrow indicators to select the total amount of travel in km.
  - **Note:** Travel will not be billed from here, but by using **Travel Raddi** instead.



Travel Entry - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

Work Order W00001480

Employee Sarah Milder

Travel Date 03 Jan 2018

Type

Detailed Description

Destination

Distance 0

Open Windows 01 Jan 2018

- When you have finished editing the **Travel Entry** screen, click on **Save**.

Travel Entry - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

Work Order WO0001480

Employee Susan Du Toit

Travel Date 03 Jan 2018

Type Normal Travel Rate

Detailed Description Travelled to client site to deal with network issues.

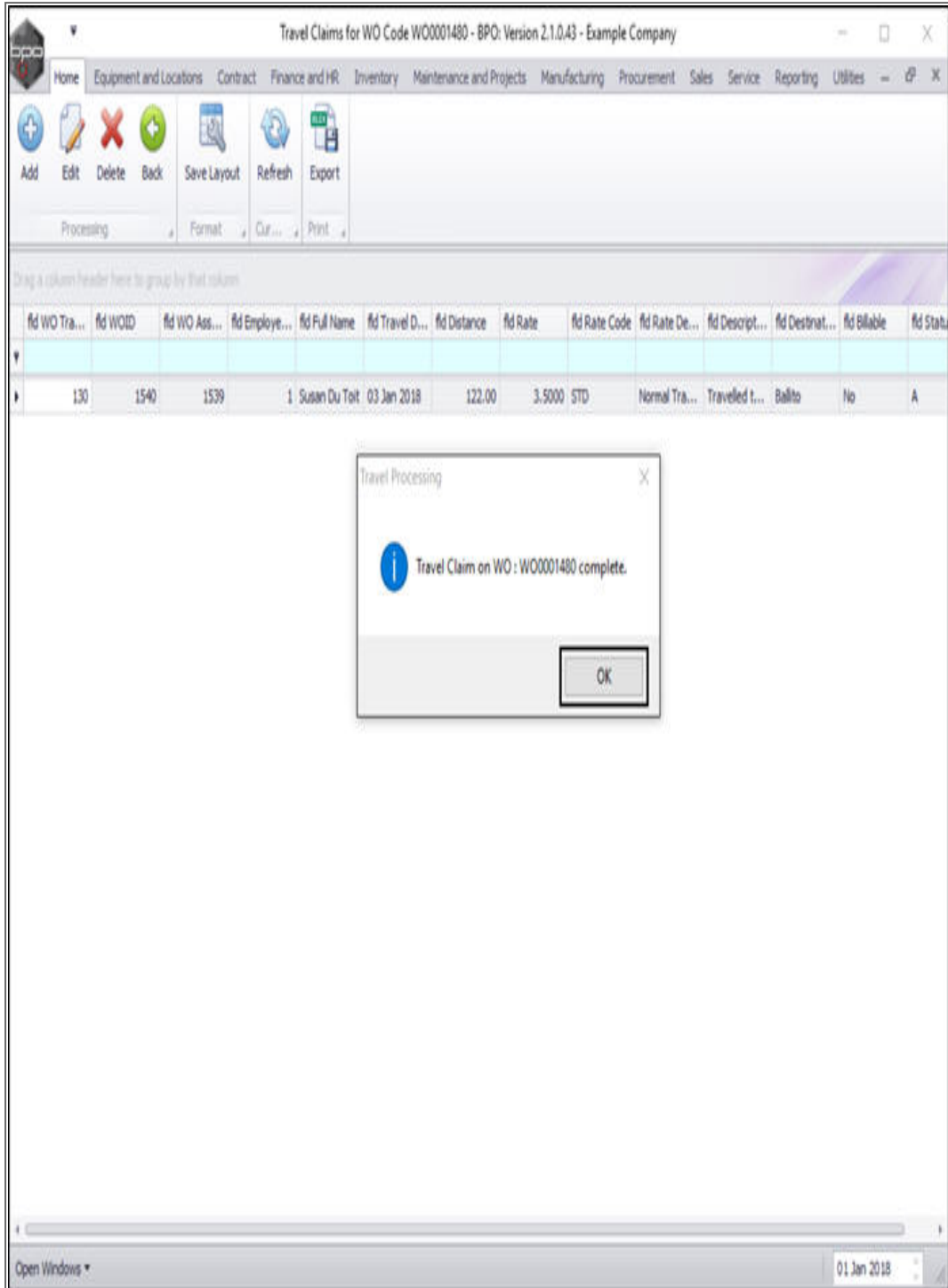
Destination Ballito

Distance 122

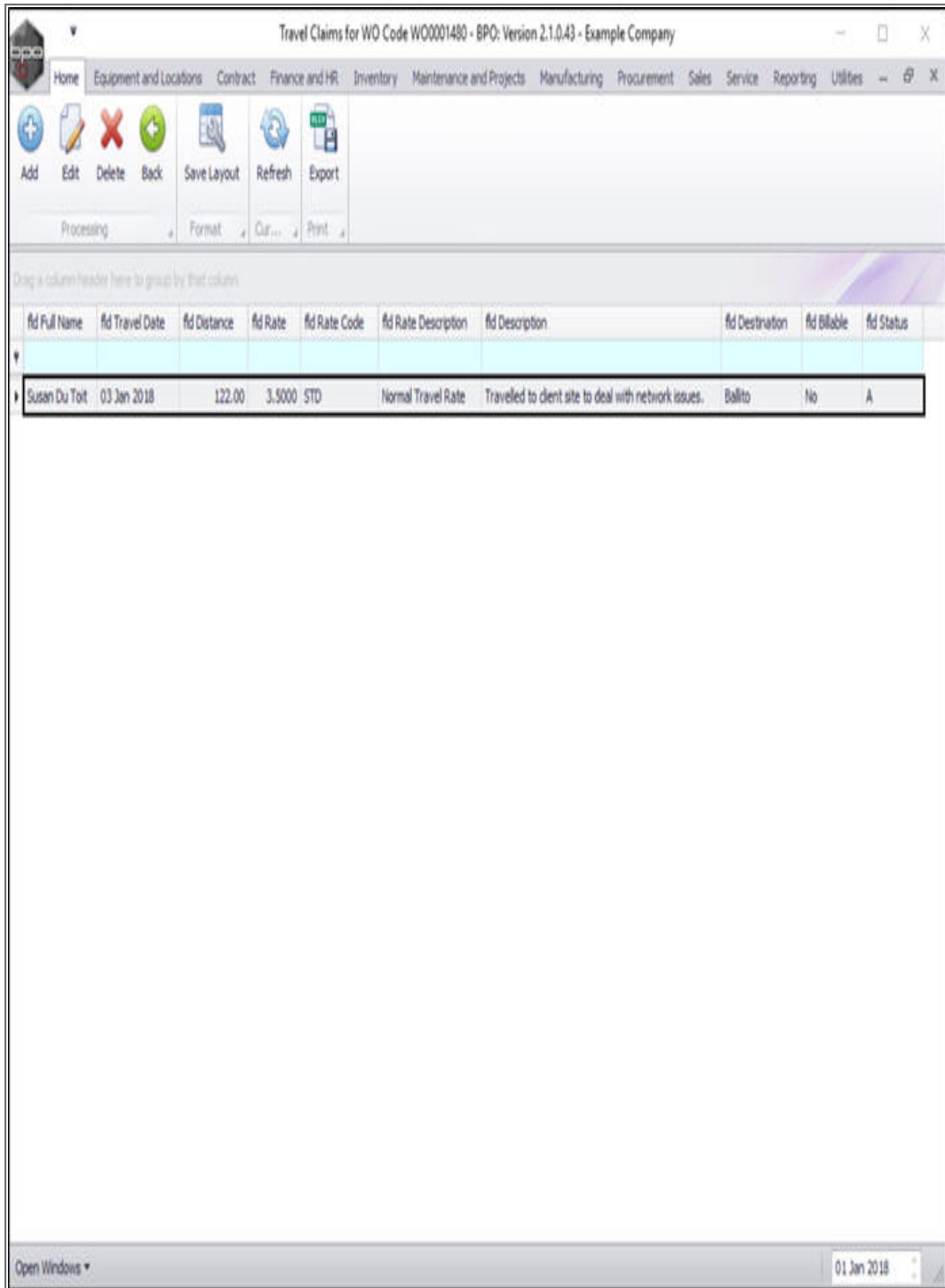
Open Windows 01 Jan 2018

- You will return to the **Travel Claims for WO Code [ ]** screen.
- A **Travel Processing** message box will pop up informing you that;

- **Travel Claim on WO: [ ] complete.**
- Click on **OK**.



- You can now view the newly added travel claim in this screen.



fd Full Name	fd Travel Date	fd Distance	fd Rate	fd Rate Code	fd Rate Description	fd Description	fd Destination	fd Billable	fd Status
Susan Du Toit	03 Jan 2018	122.00	3.5000	STD	Normal Travel Rate	Traveled to client site to deal with network issues.	Ballito	No	A

MNU.122.016

