

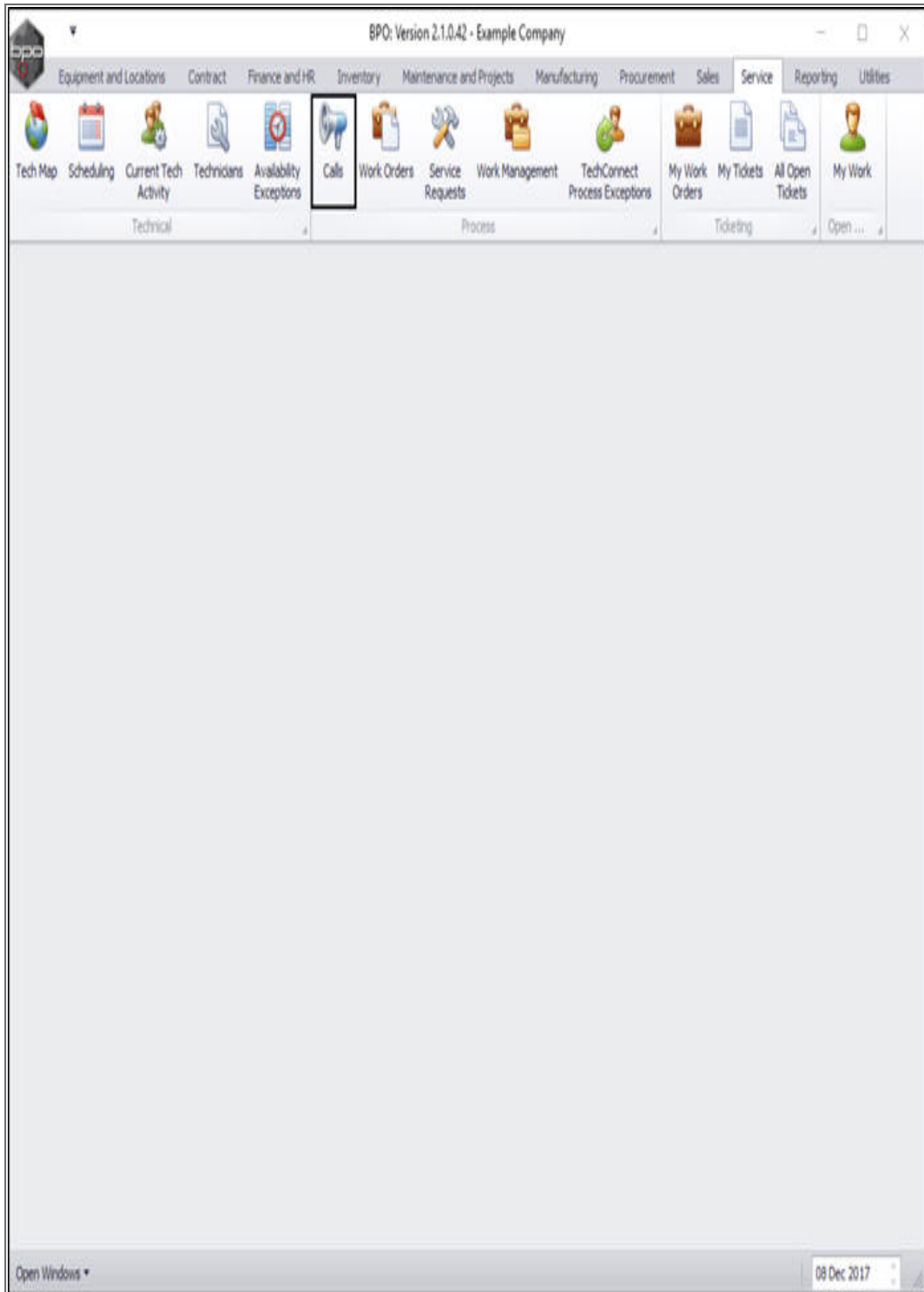
We are currently updating our site; thank you for your patience.

SERVICE

CALLS - UPDATE THIRD PARTY SERVICE COST

The cost of **Third Party Services** procured should be updated on the **Call**, especially if you wish to invoice the client for the service.

Ribbon Access: Service > Calls



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**.

The screenshot displays the 'Call Listing' application interface. The top menu includes Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The toolbar contains icons for Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area features a 'Find' and 'Filter' section on the left, a tree view showing 'Durban' selected under 'Information' and 'New' selected under 'Status', and a main data table with columns: CallReference, CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and SerialNo. The table contains multiple rows of call records, with the first row highlighted in green.

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	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

- Click on the **row selector** in front of the **call** you wish to **update** the **third party service cost** of.
- Click on **Edit**.

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

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

Call maintenance: Call ref. - CN0000496 - 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 | Close | Complete | Assign | Hold | Pending | Release | Reinstale | Save Layout | Workspaces | Print | Note

Maintain | Process | Format | Print | Info

Links
Enter text to search...

Functions

- Work Orders** (highlighted)
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info

Customer: Hope Works

Contact: Mandy Jefferson

Contact No.: 031 555 1234

Address: Plot 91 Leaf Road, Forest Hills, New Town, Durban South

Call Type: Scheduled Maintenance

Error Code:

Description: TT002 - Weekly - Call per WO

Call Date Time: 19 Jun 2017 12:14:44

Priority: 2

SLA: 0.00

Date Required: 19 Jun 2017

Order No.:

Logged By: BiancaD

Status: N - New

Optional No.:

Relates To:

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Contract No	CO0000020
Location	Forest Hills Centre
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Closure Details:

Action

Closure Date Time: 00:00:00

Closed By

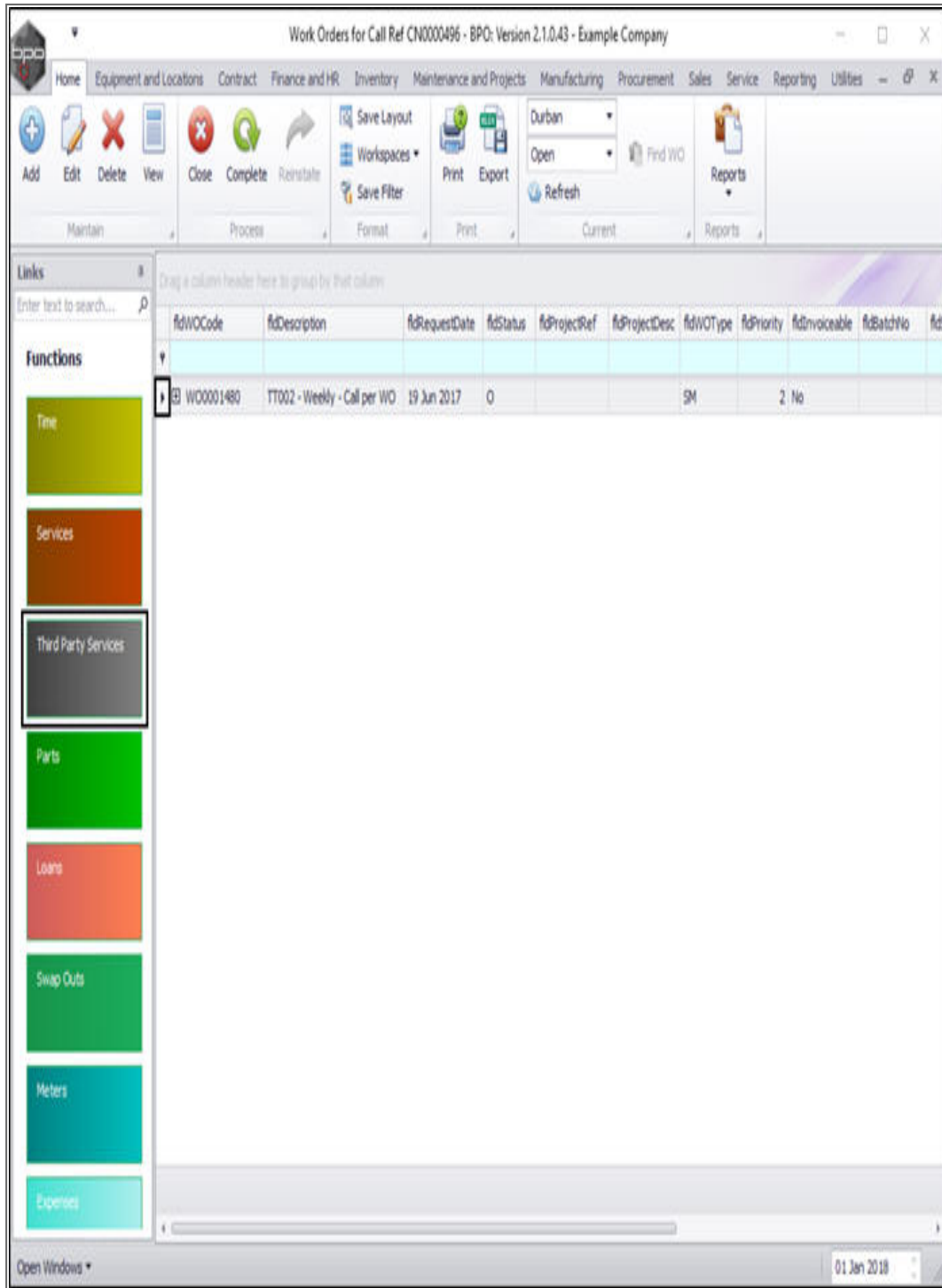
Meters

Open Windows

01 Jan 2018

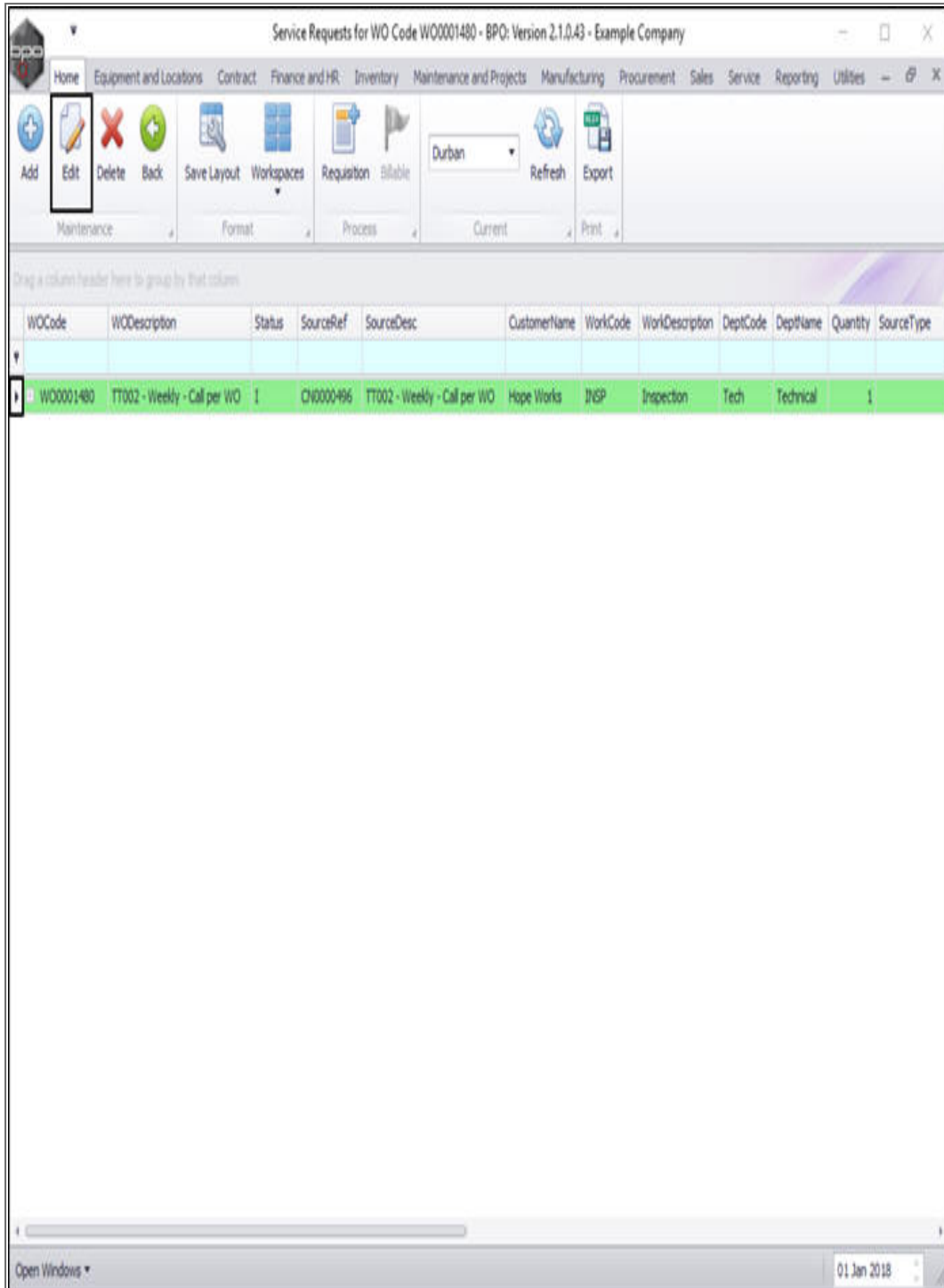
The **Work Orders for Call Ref []** screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to **update** the **third party service cost** of.
- Click on the **Third Party Services** tile.

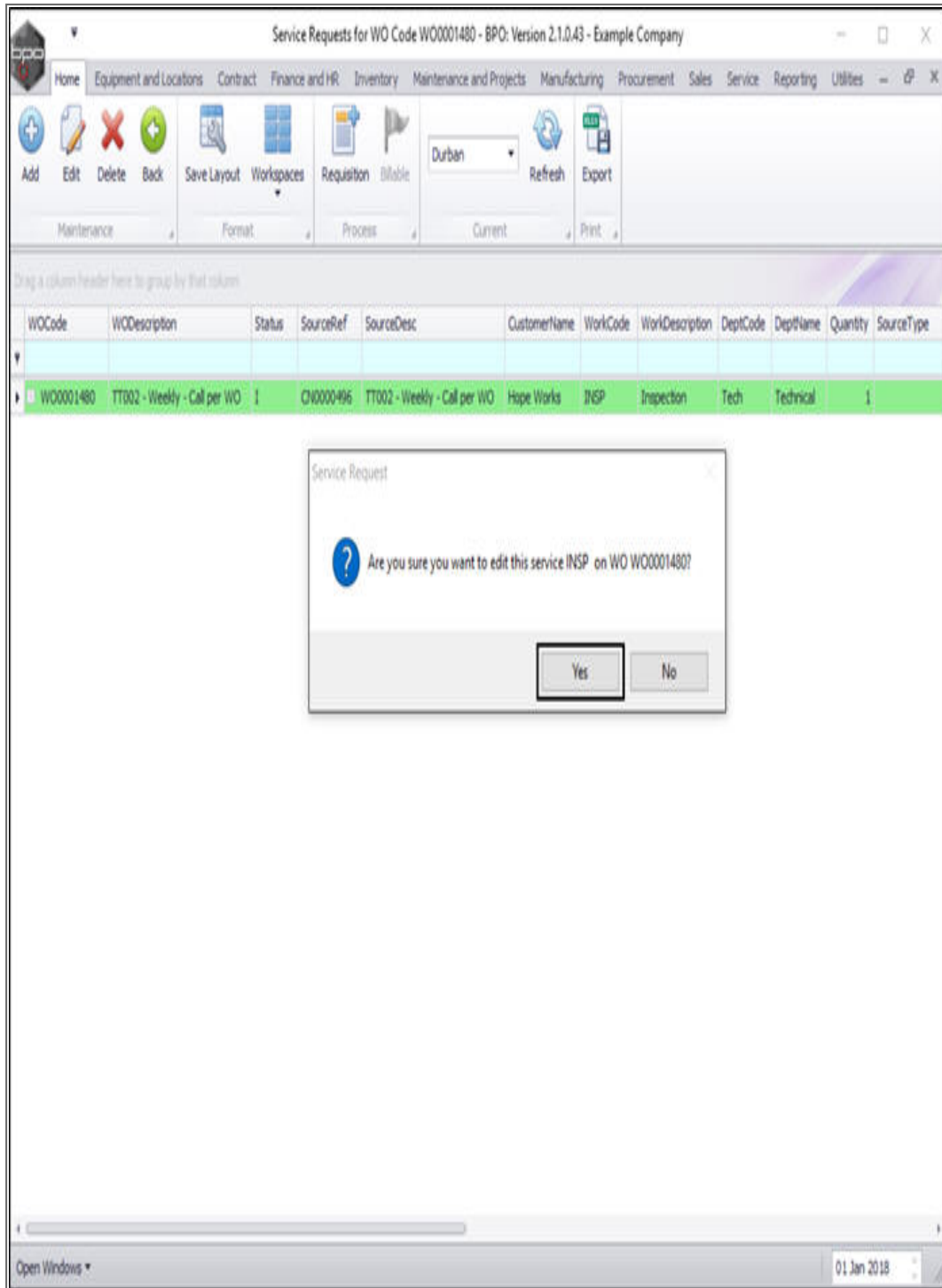


The **Service Requests for WO Code []** screen will be displayed.

- Select the **row** of the service request where you wish to **update** the **cost**.
- Click on **Edit**.

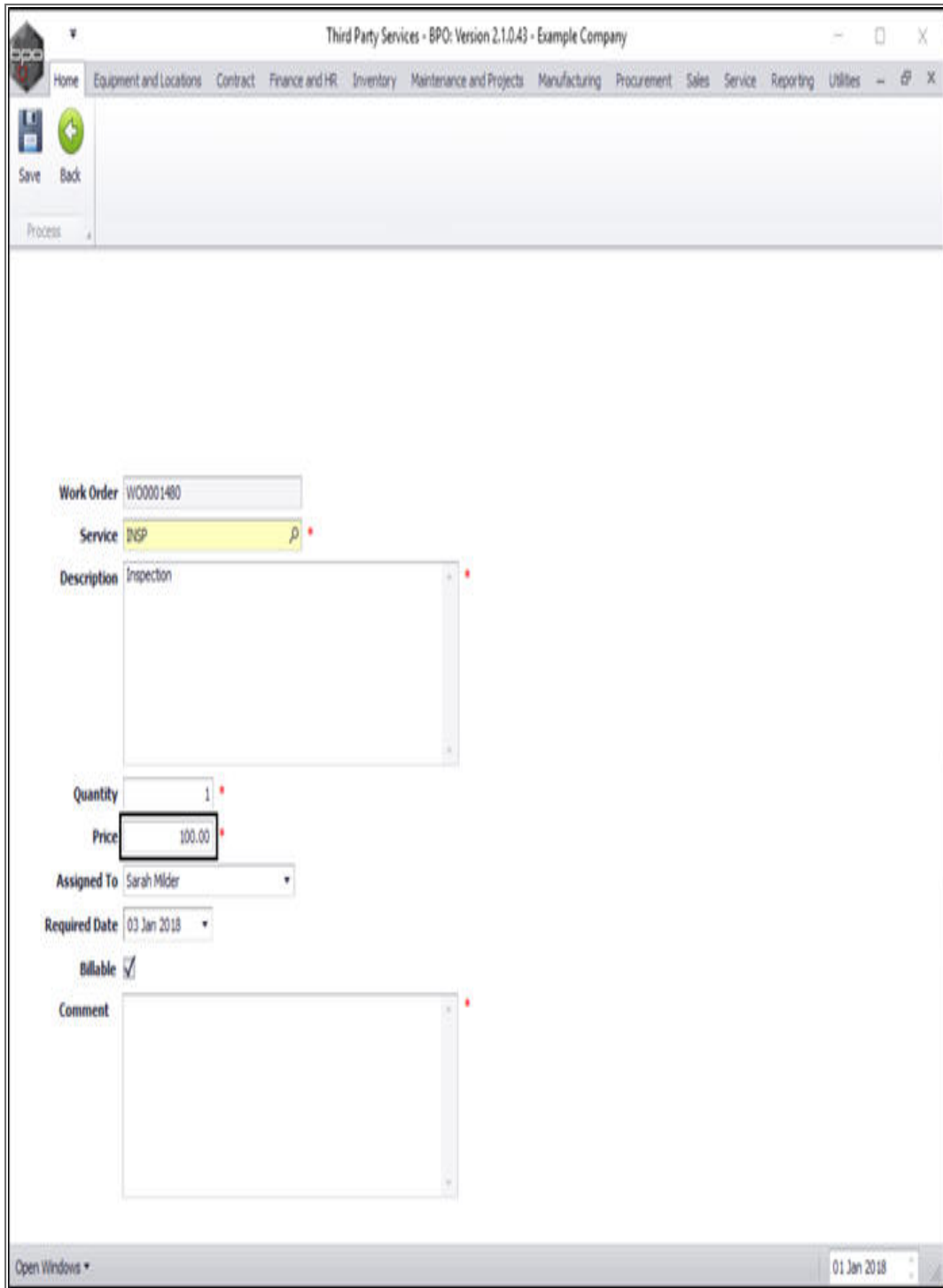


- A **Service Request** message box will pop up asking;
 - **Are you sure that you want to edit this service [] on WO []?**
- Click on **Yes**.



The **Third Party Services** screen will be displayed.

- The **Price** field has been highlighted to be changed.



The screenshot shows a web-based application window titled "Third Party Services - BPO: Version 2.1.0.43 - Example Company". The interface includes a top navigation bar with menu items: 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 "Save", "Back", and "Process" buttons. The main content area contains a form for editing a service record. The form fields are as follows:

- Work Order:** WO0001480
- Service:** INSP (highlighted in yellow)
- Description:** Inspection
- Quantity:** 1
- Price:** 100.00 (this field is highlighted with a black border)
- Assigned To:** Sarah Milder
- Required Date:** 03 Jan 2018
- Billable:**
- Comment:** (empty text area)

At the bottom of the window, there is a status bar with "Open Windows" on the left and "01 Jan 2018" on the right.

- Type in the updated price of the third party service.
- Click on **Save**.

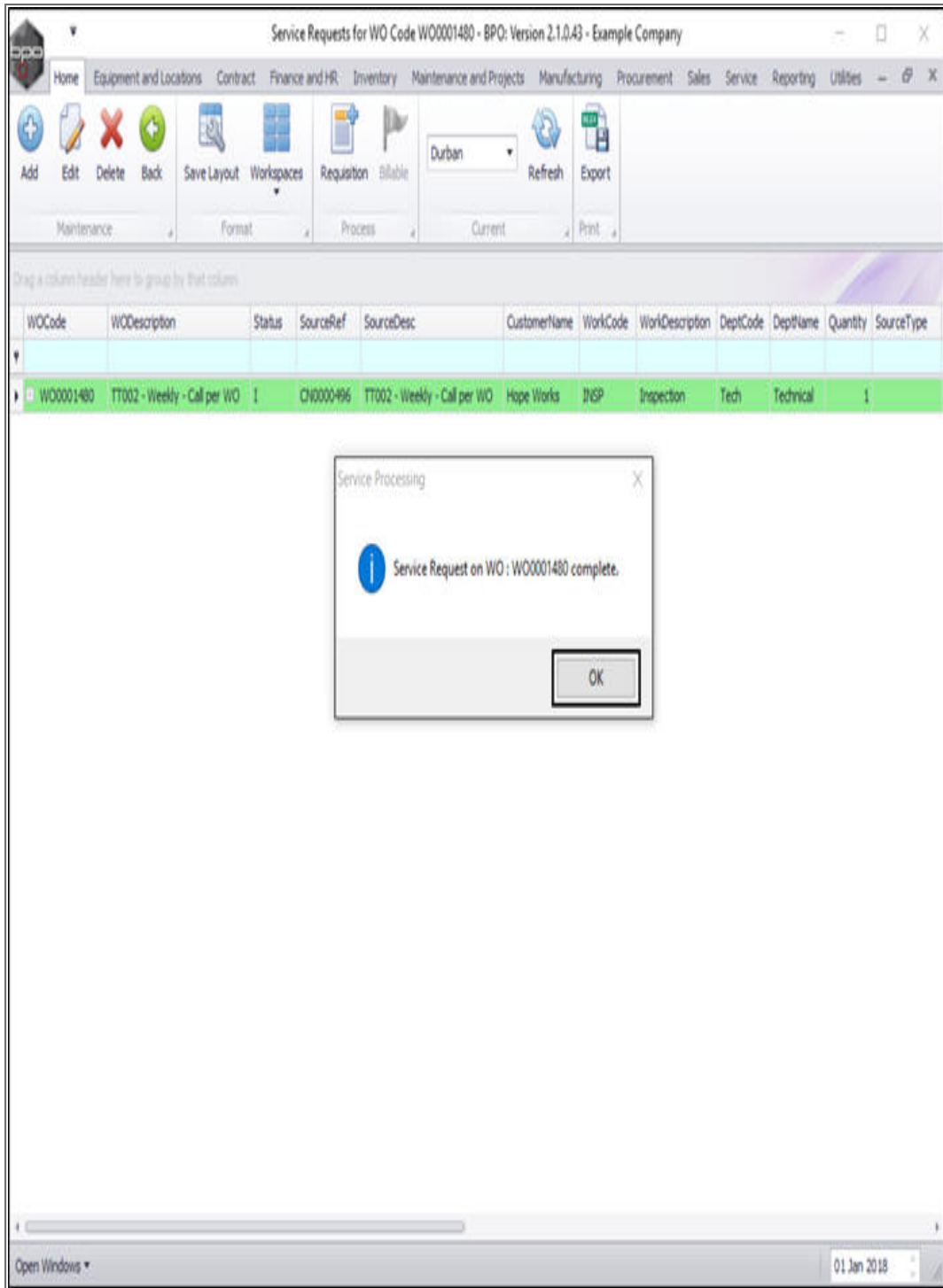
- **Note:** Billable: This will be set to billable by default, unless the service is linked to the contract as an inclusion.

The screenshot shows a software window titled "Third Party Services - BPO: Version 2.1.0.43 - 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. On the left, there are "Save" and "Back" buttons. The main form contains the following fields:

- Work Order: W00001480
- Service: INSP
- Description: Inspection
- Quantity: 1
- Price: 250.00
- Assigned To: Sarah Milder
- Required Date: 03 Jan 2018
- Billable:
- Comment: (empty text area)

At the bottom left, there is an "Open Windows" dropdown, and at the bottom right, the date "01 Jan 2018" is displayed.

- You will return to the **Service Requests for WO Code []** screen.
- A **Service Processing** message box will pop up informing you that;
 - **Service Request on WO: [] complete.**
- Click on **OK**.



- You can now view the updated third party details in this screen.
- **Scroll right** in the row to view the updated **Total Cost** figure.

Service Requests for WO Code W00001480 - 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

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

Maintenance | Format | Process | Current | Print

Drag a column header here to group by that column

Bus	RequestorName	RequiredDate	AssignedTo	AssignedToEmpId	AssignedToName	EstimatedPrice	TotalCost	ActualCost	Billable	Comments
Required	Sarah Milder	03 Jan 2018	24 ML001	Sarah Milder	250.00	<u>250.00</u>	0.00	Yes		

Open Windows | 01 Jan 2018

MNU.122.017

