

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

SERVICE

CALLS - CUSTOMER SERVICE HISTORY REPORT

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 Compatibility¹. 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.

When a call has been linked to a Serial Number, then the Customer Service History option will be available for generation. The Customer Service History Report is available on the call listing, call maintain and asset listing screen, this report can be generated from each screen's respective print button. The report will display all calls relating to a customer, the related asset, along with all parts issued, meter readings and work order information that was captured.

Ribbon Select Service > Calls



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

¹BPO2 v2.5.1.3 or higher



Calls - Customer Service History Report

Home Equipment / Li	cations Contract	Finance / HR Invent	ocy Maintenan	re (Projects Manufa	churino Procurente		Listing - BPO: Version 2.5.1.4 - Example Company Service Reporting Utilities							
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rmation	E CN0001003	Young Bectric	13/12/202	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samanthas Diner	12/12/202	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
O New	E CN0001001	Young Electric	29/11/202	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	31/10/202	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Hold Pending	E CN0000992	Top Vehicle Hire	25/10/202		Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP 12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/202			16:38:15		DR	Select Call Type					
O Al	E CN0000989	Derton / Technologies	13/06/202			09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/202			05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/202			05:00:00	Call logged 3 days ago for elapse time checks	UPG	Upprade	0.018	0001	sin123		
In Progress		Young Electric	07/06/202			05:00:00		DR	Select Cal Type			sin123		
Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/202			16:09:13		UPG	Upgrade			20-98765		
Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/202			05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O Complete		Hope Works (Pty) Ltd Hope Works (Pty) Ltd												
O AI	E CN0000983		09/06/202			05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric	10/06/202			05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
New		Young Electric	19/11/201			11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/201			16:30:20	test another call email	ADM	Administration			095011015		
6 Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/201		Bianca Du Toit	15:57:00		CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/201			03:00:00	BathBinNeint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/201			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
() Al	E CN0000969	Hope Works (Pty) Ltd	16/11/201			03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
S Bloemfontein	E CN0000968	Green Tea Supplies	16/11/201	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
 New In Progress 	⊞ CN0000967	Westwood Dynamic	15/11/201	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
Hold	E CN0000966	Westwood Dynamic	08/11/201	UnAssigned		05:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/201	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/201	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
Q AI	E CN0000963	Westwood Dynamic	25/10/2012	UnAssigned		08:00:00	SathSinNeint - Bathroom Bin Maintenance	514	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	18/10/201			03:00:00	Tier - Commercial Tier Test	DAST	Installation				Forest Hills Centre	
	E CN0000960	Westwood Dynamic	18/10/201			08:00:00	BathSinNaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	. 11/10/201			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/201			08:00:00	SathBinNaint - Bathroom Bin Maintenance	54	Scheduled Meintenance				Checkers Centre - Hildrest	
	E CN0000957	Westwood Dynamic	27/09/201			08:00:00	BathBinMaint - Bathroom Bin Maintenance	3M	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic Westwood Dynamic	20/09/201			03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
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	E CN0000955	Hope Works (Pty) Ltd	18/09/201					SM SM				NEW 1234	o watchis Centre	
	E CN0000954	Green Tea Supplies	17/09/201			08:00:00	2MS - 2 month service	Drft .	Scheduled Maintenance			NEW 1234	Charless Contra Ullerate	
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- 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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			Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
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			Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM				NEW 1234		
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• Select the **Call** you wish to work with.



Calls - Customer Service History Report

Home Equipment / L							isting - BPO: Version 2.5.1.4 - Example Company							
Home Equipment / L			tory Maintenance	/ Projects Manufac	turing Procuremen	t Sales	Service Reporting Utilities							
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formation	E CN0001003	Young Bectric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samenthas Diner	12/12/2022			16:18:30	Test call for account balances manual.	DB	Select Cal Type			19-12/1202		
New New Yorks	E CN0001001	Young Bectric		UnAssigned		11:29:19	Order the same part twice receive with different batch num.	CP.	Change Request			sin123		
 In Progress 	E CN0000996	Hope Works (Ptv) Ltd		UnAssigned			ForRentaContract	NDR	New Deal Rental				BPO2 TEST 1	
O Hold O Pending	► CN0000992	Top Vehicle Hire		Awaiting Acceptance	Daniel Balcowen	14:09:17	Loan machine for temporary high volume printing requirement	STRV.	Service			TOP 12340LD		
Pending Complete	E CN0000991	Apple Juice Inc	24/10/2022		ponen	16:38:15	Contract Closure - CO0000054	DR	Select Call Type			100 1000		
O Al	E CN0000989						Call for Monday elapse hours check							
Pretoria	E CN0000988	Young Electric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Confouration	sin123		
O New	E CN0000987	Young Electric		UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upprade			sin123		
() In Progress	E CN0000986	Young Electric		UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Cal Type			sin123		
() Hold	E CN0000985	Hope Works (Pty) Ltd		UnAssigned		16:09:13	Test future call - for elapsed time	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		
() Al	E CN0000982	Young Electric				05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape Town	E CN0000975			Awaiting Acceptance	Ramon Du Talà	11:24:39	Test with site manager email entered	ADM	Administration			107		
New	E CN0000974	Hope Works (Ptv) Ltd		Amating Acceptance		11/24/39	test another call email	ADM	Administration					
 In Progress Hold 	E CN0000972	Hope Works (Pty) Ltd		Awaiting Acceptance		15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic		UnAssigned	biarica Du Turc	08:00:00	BathBinNaint - Bathroom Bin Maintenance	54	Scheduled Maintenance			093011013	Checkers Centre - Hilcrest	
Complete	E CN0000970	Westwood Dynamic Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	5M	Scheduled Maintenance				Checkers Centre - Hildrest	
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tioemfontein	E CN0000969	Hope Works (Pty) Ltd Green Tea Supples		UnAssigned		08:00:00	1ier - Commercial Her Test 2MS - 2 month service	54	Scheduled Maintenance			NEW 1234	Forest Hills Centre	
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In Progress	E CN0000967	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
() Hold	E CN0000966	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019			03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O All	E CN0000963	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd		UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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	E CN0000959	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000957	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
		Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	EE CN0000955	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies		UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	III CLIADADATA						RobRettelet Roberts Robinson	194.4					Martine Press, Albert	
	Count: 31	96												

- Click on the **Print** button to display a list of **Report Options**.
- Click on Customer Service History.

				Call Listin	ng - BPO: Vers	on 2.5.1.4 - 1	v2514 Example Company				- 2
Home Equipment / Locations	Contract Fin	nance / HR Inventory	Maintenance / Proj	ects Manuf	acturing Pr	ocurement	Sales Service Reporting Utilities				_ 8
Add Edit Refresh My Calls	Save Layout	My Call Assign Start		Pending Relea	•	Reports					
						I Report					
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	CalReference	CustomerName	CallDate	CallState	Tec De	ivery Report		CallType	CallTypeDesc	ErrorCode	ErrorCodeD
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Information	E CN0001036	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Bel Cu	stomer Servio	e History	SERV	Service		
- O Durban	E CN0001035	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Bianca Du T	10:38:38	Paper keeps jamming.	REP	Repair		
O New	E CN0001034	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Bianca Du T	10:29:04	Full set of toners required	TON	Toner Required		
In Progress	CN0001032	Young Electric	02/10/2023				Test credit note on work order	MN	Manufacturing		
Hold Pending	E CN0001031	Hope Works (Pty) Ltd		UnAssigned		12:56:41	New Deal created from order OR0000306	NDS	New Deal Sale		
Complete	E CN0001024	Hope Works (Pty) Ltd		UnAssigned		09:23:50	Contract for Expiry Test	NDR	New Deal Rental		
O Al	E CN0001023	Derton / Technologies	08/09/2023	UnAssigned		10:52:25	Open warranty daims have not been processed.	INSP	Inspection		
Pretoria	E CN0001022	Derton / Technologies	08/09/2023	UnAssigned		10:44:45	Meters attached with no readings captured	INST	Installation		
O New	E CN0001017	Derton / Technologies	07/09/2023	UnAssigned		16:43:14	Call Exceptions - to correct but not flag.	INST	Installation		
In Progress	E CN0001015	Hope Works (Pty) Ltd			Bianca Du T	15:56:53	Test call sla functionality	SERV	Service		
Hold	E CN0001014	Apple Juice Inc	22/08/2023	UnAssigned		11:30:52	Contract Closure - CO0000086	TR	Training		
Pending	E CN0001012	Panda Copiers	22/08/2023	UnAssigned		11:28:32	Contract Closure - CO0000041	DR	Select Call Type		
 Complete 	E CN0001011	Young Electric		UnAssigned		11:28:26	Contract Closure - CO0000031	DR	Select Call Type		
G Al	E CN0001010	Dancing Shoes	22/08/2023	UnAssigned		11:28:18	Contract Closure - PC0000001	DR	Select Call Type		
- Cape Town	E CN0001009	Young Electric	22/08/2023	UnAssigned		11:27:49	Contract Closure - CO000008	DR	Select Call Type		
O New	E CN0001009	Office Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type		
In Progress	CN0001007	Apple Juice Inc		UnAssigned		10:18:33	Machine inspection required	INSP	Inspection		
Hold Pending	E CN0001007				N			PR	Parts Requirement	SERV	Services
Complete		Hope Works (Pty) Ltd	07/06/2023		Bianca Du T		Machine repair required	SM			
O Al		Hope Works (Pty) Ltd	07/06/2023	UnAssigned		10:14:52	Walls require repainting		Scheduled Maintenance	SERV	Services
- Sloemfontein	E CN0001003	Young Electric	13/12/2022	Awaiting Ac		10:09:10	Test account balances	DR	Select Call Type		
O New	E CN0001002	Samanthas Diner	12/12/2022		. Mary Thom	16:18:30	Test call for account balances manual.	DR.	Select Call Type		
In Progress	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num.		Parts Requirement		
() Hold		Hope Works (Pty) Ltd		UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental		
Pending		Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	ADM	Administration		
O Complete	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	DR.	Select Call Type		
O AI	Count: 375	5									

- When you receive the **Report Generation** message to confirm;
 - Do you want to print the Customer Service History
 - Report for the equipment on call CN[number]?
- Click on Yes.

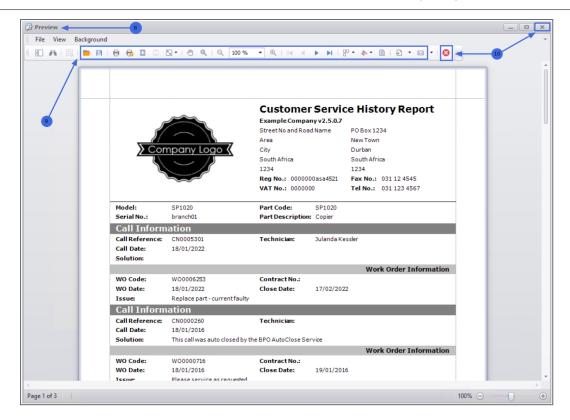


Calls - Customer Service History Report

Home Equipment / Locatio	ns Contract Fin	ance / HR Inventory	Maintenance / Proj	ects Manufa	acturing Pr	ocurement	Sales Service Report	ting Utilities				- 8
dd Edit Refresh My Calls	🐐 Save Filter	12 Start		Pending Release	*	Reports						
Find O Filter												
	CalReference	CustomerName	CalDate	CallState	Technician	CallTime	Description		CallType	CallTypeDesc	ErrorCode	ErrorCode
Information	▼ 10:	×0:		* 0 ¢	1 0 0	1 0 0	 0 		* 0 :	(D):	10:	* O C
		Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Belinda Sha	10:40:51	Copier service required.		SERV	Service		
Durban O New		Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Bianca Du T	10:38:38	Paper keeps jamming.		REP	Repair		
In Progress		Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac	Bianca Du T	10:29:04	Full set of toners required		TON	Toner Required		
() Hold	CN0001032								MN	Manufacturing		
O Pending		Hope Works (Pty) Ltd	29/09/2023	UnAssigned		12:56:41	New Deal created from orde	r OR0000306	NDS	New Deal Sale		
C Complete		Hope Works (Pty) Ltd	12/09/2023	UnAssigned		09:23:50	Contract for Expiry Test		NDR	New Deal Rental		
Q AI	E CN0001023	Derton / Technologies	08/09/2023	UnAssigned		10:52:25	Open warranty claims have	not been processed.	INSP	Inspection		
- O Pretoria	E CN0001022	Derton / Technologies	08/09/2023	Report Ger	peration			s captured	INST	Installation		
O New	E CN0001017	Derton / Technologies		nepore dei	iciation .			ot flag.	INST	Installation		
 In Progress 	E CN0001015	Hope Works (Ptv) Ltd							SERV	Service		
() Hold	E CN0001014	Apple Juice Inc	22/08/2023		int to print the t on call CN00		rvice History Report for the		TR	Training		
Pending	E CN0001012	Panda Copiers	22/08/2023						DR	Select Call Type		
Complete	E CN0001011	Young Electric	22/08/2023						DR	Select Call Type		
All	E CN0001010	Dancing Shoes	22/08/2023				Yes No		DR	Select Call Type		
+ 🖸 Cape Town	E CN0001009	Young Electric	22/08/2023	UnAssigned		11:27:49	Contract Closure - CO00000	109	DR	Select Call Type		
O New	E CN0001009	Office Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - CO00000		DR	Select Call Type		
 In Progress Hold 	CN0001003	Apple Juice Inc		UnAssigned		10:18:33	Machine inspection required		INSP	Inspection		
Pending					Distance Dou T				PR		00011	Condense
Complete		Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac	biancà Du T		Machine repair required			Parts Requirement	SERV	Services
O All	E CN0001005	Hope Works (Pty) Ltd	07/06/2023	UnAssigned		10:14:52	Walls require repainting		SM	Scheduled Maintenance	SERV	Services
- D Bloemfontein	E CN0001003	Young Electric	13/12/2022	Awaiting Ac		10:09:10	Test account balances		DR	Select Call Type		
(New	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Ac	Mary Thom	16:18:30	Test call for account balance		DR	Select Call Type		
 In Progress 		Young Electric	29/11/2022	UnAssigned		11:29:19		eceive with different batch num		Parts Requirement		
() Hold		Hope Works (Pty) Ltd		UnAssigned			ForRentalContract		NDR	New Deal Rental		
Pending	CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO00000	054	ADM	Administration		
 Complete 	⊞ CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hour	's check	DR	Select Call Type		
O Al	Count: 375											

- The selected Report will display in the Reports **Preview** screen.
- From this screen you can make cosmetic changes to the document, as well as Save, Zoom, Add a Watermark, Export or Email the Call Report.
- Close the **Preview** screen when done.





MNU.122.031