

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

SERVICE

CALLS – WORK ORDERS

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 [Call Centre Mode](#) notes.

A **work order**, or job card is an order for work to be performed for a **Company** or a **Customer**. All transactions concerning this work, such as part issues, labour time, etc. are logged against the work order.

When work is required for a **Customer**, a **Call** is raised. The system will generate a work order in the background. Transactions are logged on the call, but stored against the work order. More than one work order can be linked to a call, for example, when different tasks needs to be performed to complete one call.

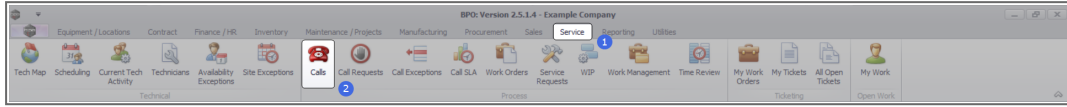
When work is required for a **Company**, such as Building Maintenance or a Machine Repair, then a work order needs to be raised **manually**.

- If the work is for Building Maintenance, or Training, then the work order must be linked to a **functional location**, which must be set up before hand.
- If the work required is for an **asset**, e.g. repair a machine in store to be sold refurbished, then the machine is linked to the **call**.

¹BPO2 v2.5.1.3 or higher

Work Orders displayed in the **Calls Work Order** listing, are a restricted list of work orders that are linked to the selected **Call**.

Ribbon Select **Service > Calls**



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

CallReference	CustomName	CallDate	CallTime	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorDesc	SerialNo	CtrLocationSubject	Priority
BN CN0001033	Young Electric	13/12/2022	Awaiting Acceptance	Ann Milan	10:09:10	Test account balances	CR	Change Request			107		3
BN CN0001034	Specialist Services	14/12/2022	Awaiting Acceptance	Revy Thompson	06:48:00	Test call for account balance manual	SM	Scheduled Maintenance			98151002		3
BN CN0001051	Young Electric	20/11/2022	Unassigned		11:30:19	Order the same part twice receive with different batch num	CR	Change Request			98123		3
BN CN0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:01:11	ForRentContract	NDR	New Deal Rental				BPO2 TEST 1	2
BN CN0000992	Top Vehicle Hire	21/10/2022	Awaiting Acceptance	Daniel Edgewen	14:06:17	Loan machine for temporary high volume printing requirement	SERV	Service				TOP123HOLD	2
BN CN0000985	Hope Works (Pty) Ltd	21/10/2022	Unassigned		08:28:18	Contract Change 100000000	SM	Sched Call Type					3
BN CN0000989	Derton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CN0000988	Young Electric	13/04/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	98123		3
BN CN0000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			98123		3
BN CN0000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 3 days ago for elapse time checks	SM	Sched Call Type			98123		3
BN CN0000985	Hope Works (Pty) Ltd	10/04/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-88765		3
BN CN0000984	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			47500000		3
BN CN0000983	Hope Works (Pty) Ltd	04/04/2022	Unassigned		06:05:31	Test elapsed time 2 - day prior	TEST	Testing			5202412346		3
BN CN0000982	Young Electric	10/04/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			98123		3
BN CN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		3
BN CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:20:29	Test another call email	ADM	Administration			99913915		3
BN CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:37:00	Test new call for email description in body	CR	Change Request			99913915		3
BN CN0000971	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000969	Hope Works (Pty) Ltd	18/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CN0000968	Green Tea Supplies	18/11/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CN0000967	Westwood Dynamic	18/11/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000964	HOCS PC IT Shop	20/10/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			147807		2
BN CN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubstMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HIlcrest	2
BN CN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- 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.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	13/12/2022	20:09:10	Test account balance	CR	Change Request			107		3
BN CH001002	Silverleaf Drive	12/12/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			107		3
BN CH001001	Young Electric	26/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000998	Hope Works (Pty) Ltd	24/09/2022	14:09:11	Loan machine for temporary high volume printing requirement	SRV	New Equip Rental				BPO2 TEST 1	3
BN CH000997	Top Works Pty	24/09/2022	14:09:11	Loan machine for temporary high volume printing requirement	SRV	Service				TOP1234567	3
BN CH000996	Askleo Asia Inc	24/09/2022	06:38:15	Contact Closure - C0000054	DR	Select Call Type					3
BN CH000989	Derton / Technologies	13/06/2022	09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	13/06/2022	09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/06/2022	06:00:00	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/06/2022	06:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/06/2022	06:00:13	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/06/2022	06:00:13	Test elapsed time 2 - day prior	TEST	Testing			576234123456		3
BN CH000982	Young Electric	18/06/2022	06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000976	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000974	Hope Works (Pty) Ltd	18/11/2019	06:30:20	Test another call email	ADM	Administration			0950191015		3
BN CH000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request					2
BN CH000971	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000970	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000963	Westwood Dynamic	25/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• Select the **Call** you wish to work with.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	13/12/2022	20:09:10	Test account balance	CR	Change Request			107		3
BN CH001002	Silverleaf Drive	12/12/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			107		3
BN CH001001	Young Electric	26/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000998	Hope Works (Pty) Ltd	24/09/2022	14:09:11	Loan machine for temporary high volume printing requirement	SRV	New Equip Rental				BPO2 TEST 1	3
BN CH000997	Top Works Pty	24/09/2022	14:09:11	Loan machine for temporary high volume printing requirement	SRV	Service				TOP1234567	3
BN CH000996	Askleo Asia Inc	24/09/2022	06:38:15	Contact Closure - C0000054	DR	Select Call Type					3
BN CH000989	Derton / Technologies	13/06/2022	09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	13/06/2022	09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/06/2022	06:00:00	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/06/2022	06:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/06/2022	06:00:13	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/06/2022	06:00:13	Test elapsed time 2 - day prior	TEST	Testing			576234123456		3
BN CH000982	Young Electric	18/06/2022	06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000976	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000974	Hope Works (Pty) Ltd	18/11/2019	06:30:20	Test another call email	ADM	Administration			0950191015		3
BN CH000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request					2
BN CH000971	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000970	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000963	Westwood Dynamic	25/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• Click on the **Edit** button.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN0001003	Young Electric	13/02/2022	09:09:10	Test account balance	CR	Change Request			107		3
BN0001002	Silverleaf Drive	12/02/2022	09:38:20	Test call for account balance manual	CR	Select Call Type			02-10/202		3
BN0001001	Young Electric	20/12/2021	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN0000996	Hope Works (Pty) Ltd	20/08/2022	13:01:11	Printed/lost contract	CR	New Deal Rental				BPO2 TEST 1	3
BN0000992	Top Vehicle Hire	20/02/2022	14:59:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BN0000991	Asda Juice Inc	24/02/2022	09:38:15	Contact Closure - C0000054	CR	Select Call Type					3
BN0000989	Deton / Technologies	13/04/2022	09:00:00	Call for Monday escape hours check	TEST	Testing			2020-2222		3
BN0000988	Young Electric	10/06/2022	08:00:00	Call logged 5 days ago for fire escaped checks	CR	Change Request	CONF	Configuration	an123		3
BN0000987	Young Electric	06/04/2022	06:00:00	Call logged 4 days ago for escape time checks	UPG	Upgrade			an123		3
BN0000986	Young Electric	03/04/2022	06:00:00	Call logged 3 days ago for escape time checks	CR	Select Call Type			an123		3
BN0000985	Hope Works (Pty) Ltd	10/04/2022	06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-46760		3
BN0000984	Hope Works (Pty) Ltd	04/04/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN0000983	Hope Works (Pty) Ltd	04/04/2022	06:00:13	Test elapsed time 2 - day prior	TEST	Testing			5202412946		3
BN0000982	Young Electric	18/04/2022	06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BN0000980	Young Electric	04/11/2019	13:24:26	Test with fire escape alarm entered	ADM	Administration			107		3
BN0000979	Hope Works (Pty) Ltd	18/11/2019	06:30:20	Test another call serial	ADM	Administration			095012051		3
BN0000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			095012051		3
BN0000971	Westwood Dynamic	20/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000970	Westwood Dynamic	22/12/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000969	Hope Works (Pty) Ltd	04/11/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN0000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN0000967	Westwood Dynamic	15/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000966	Westwood Dynamic	08/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000965	Westwood Dynamic	02/11/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000964	HCC PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN0000963	Westwood Dynamic	21/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN0000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN0000960	Westwood Dynamic	18/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000959	Westwood Dynamic	11/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000958	Westwood Dynamic	04/10/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000957	Westwood Dynamic	27/09/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000956	Westwood Dynamic	20/09/2019	08:00:00	Sub/Hall - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BN0000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN0000954	Green Tea Supplies	17/08/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The **Call maintenance : Call ref - [call reference number]** screen will display.
- Click on the **Work Orders** tile.

Customer: Sp Bargains
 Contact: Tarryn Snow CUSTOMER CONTAI
 Contact No.: 031 123 4567
 Address: 29 Dune Ave, New Town, Durban
 Call Type: Implementation
 Error Code: B6004
 Description: B6004
 Call Date Time: 04/04/2022 12:25:17
 Priority: 2
 SLA: 0.00
 Date Required: 11/04/2022
 Order No.: OR0000336
 Logged By: JulandK
 Status: N - New
 Optional No.:

ReferenceType	ReferenceNo
Prior Call Reference	
Call Request Reference	
Contract No	Hillcrest
Location	Hillcrest
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	OR0000336

- The **Work Orders for Call Ref [call reference number]** screen will display.

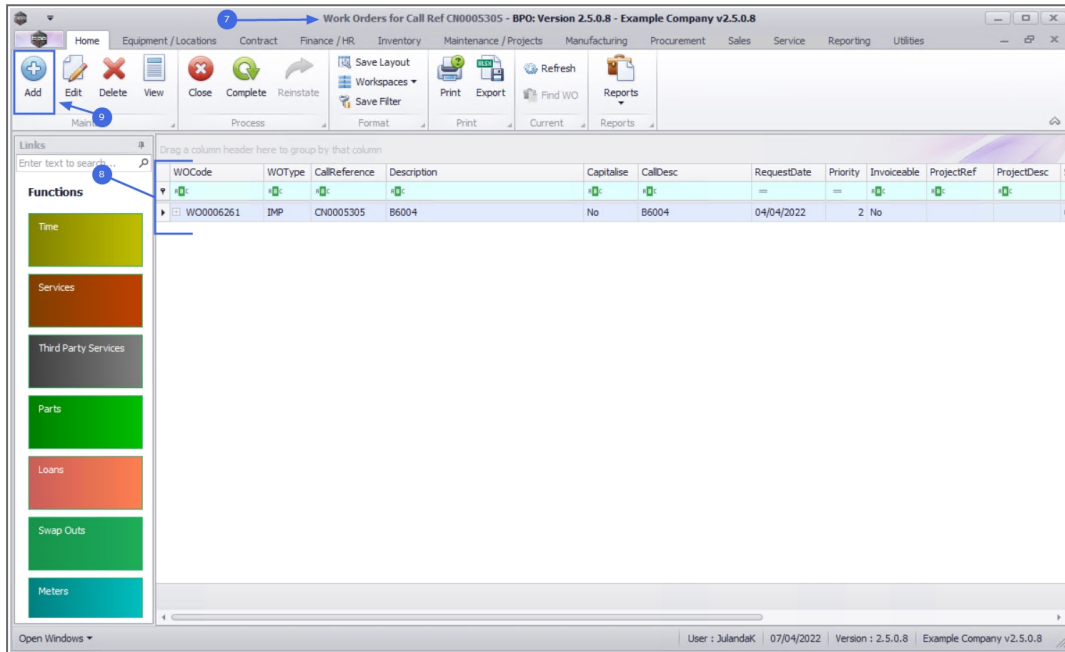
- Any work orders that have been issued against the call will display in the data grid.

ADD WORK ORDER

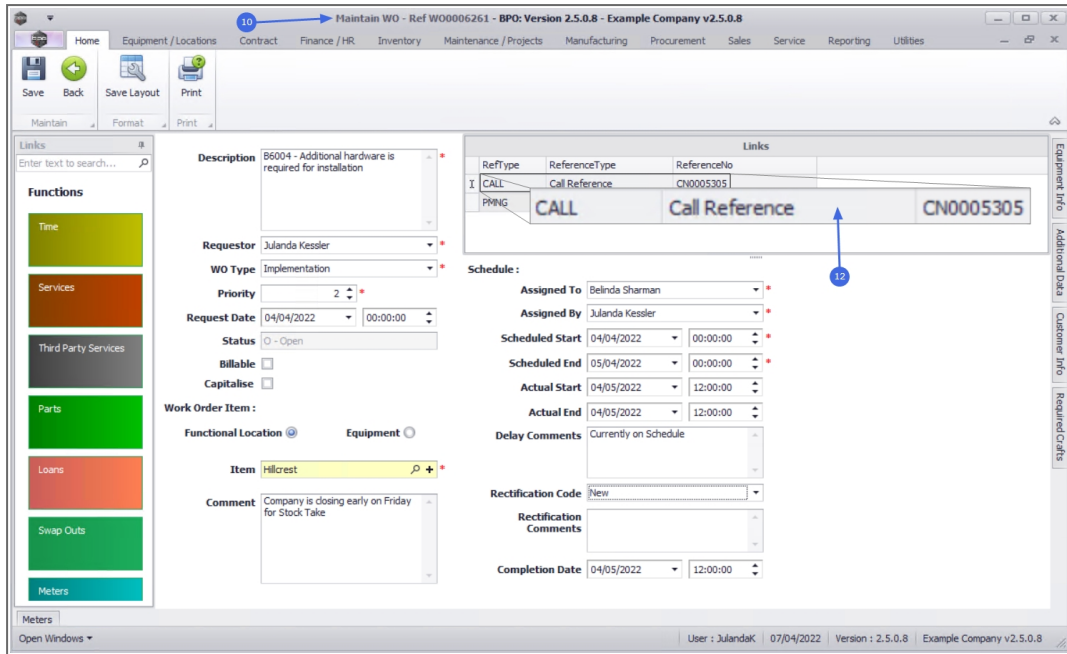
- Click on **Add**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add**.

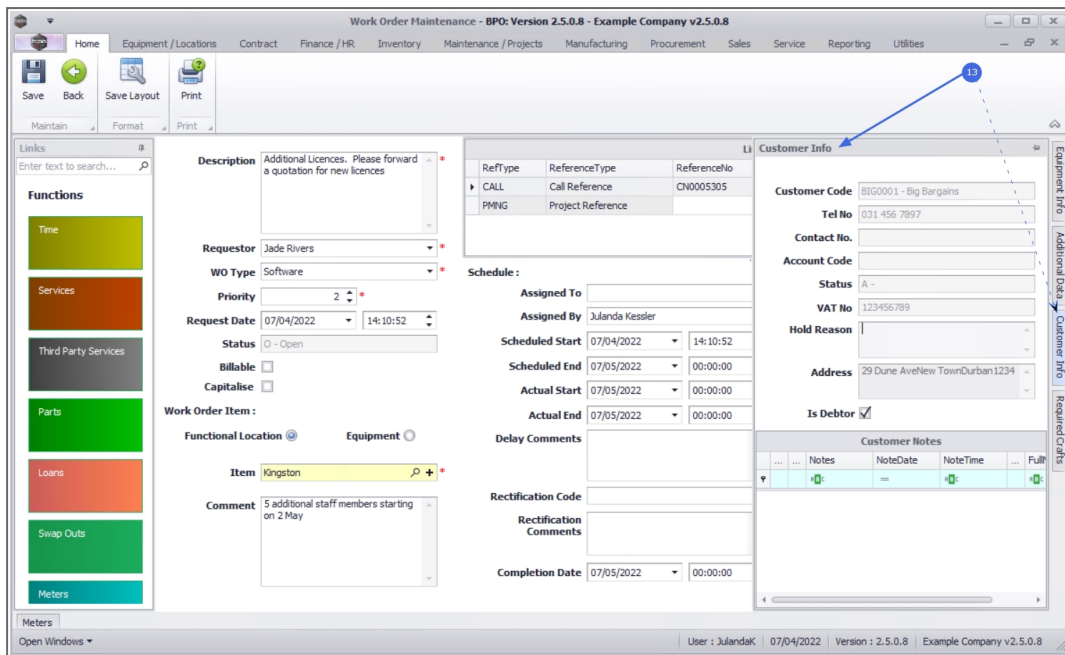


- " The Work Order Maintenance screen will be displayed. " on page 2
- Complete the Work Order details for the call.
- In the **Links** frame note that the **Call Reference** has automatically been linked to the call reference you have selected.




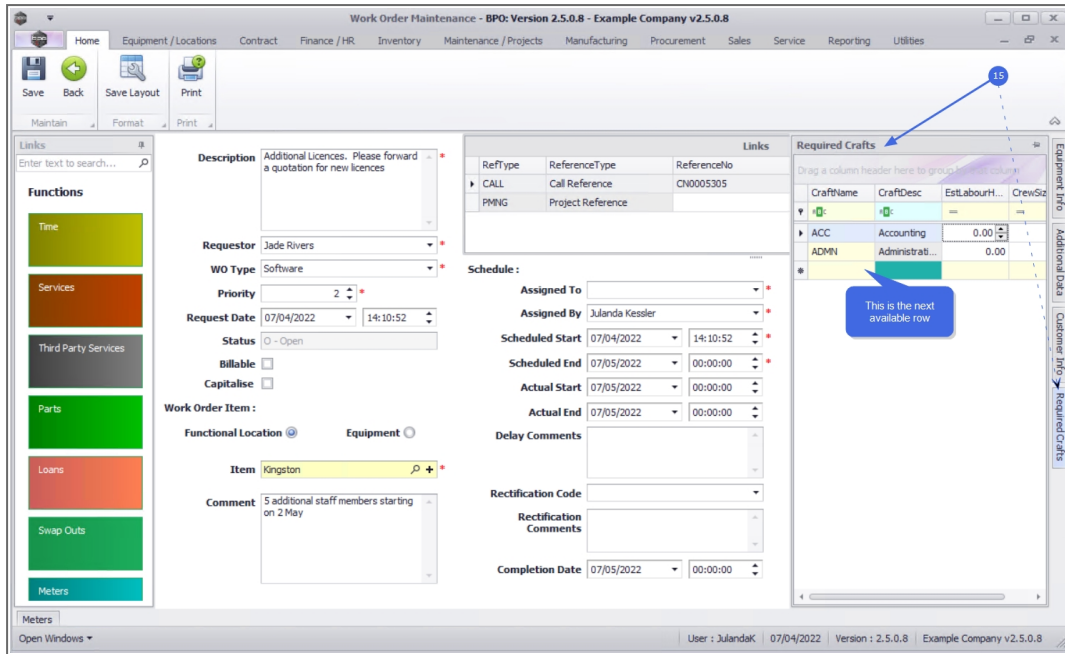
CUSTOMER INFO TAB

- Click on the **Customer Info** tab to expand the **Customer Info** docking panel.
- From here you can view additional information for the **customer** linked to this work order as well as the Customer Notes, if any has been created.



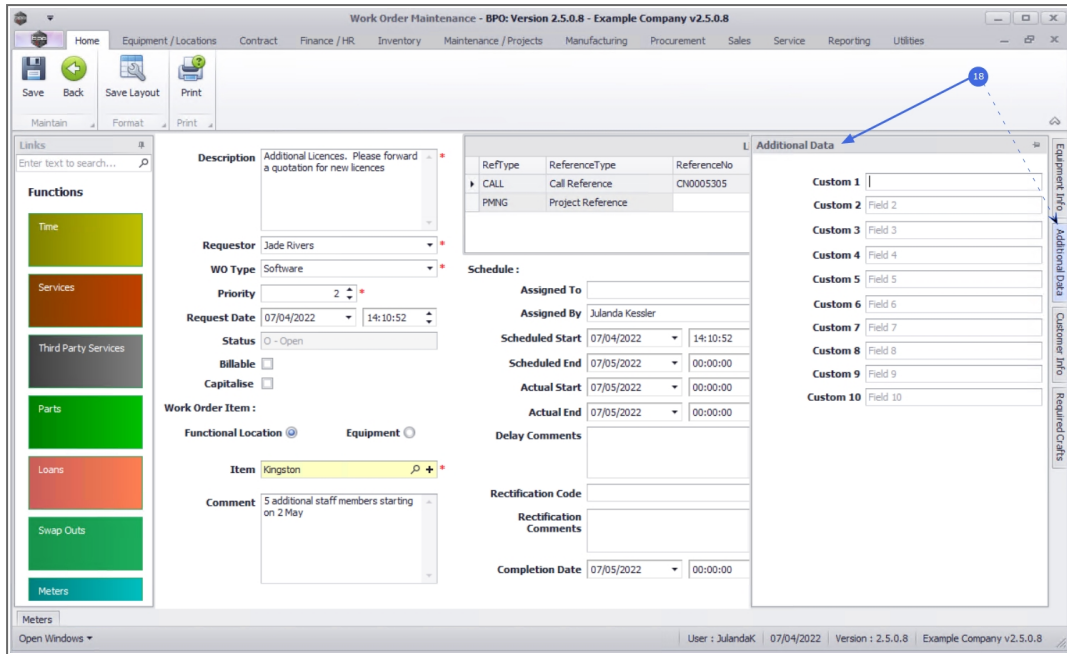
REQUIRED CRAFTS TAB

- Click on the **Required Crafts** tab to expand the Required Crafts docking panel.
- Crafts that have already been identified for the work order will be listed.
-  **Right click** on the next active row in the **Craft Name** field to add any additional craft(s) needed for carrying out this Work Order.



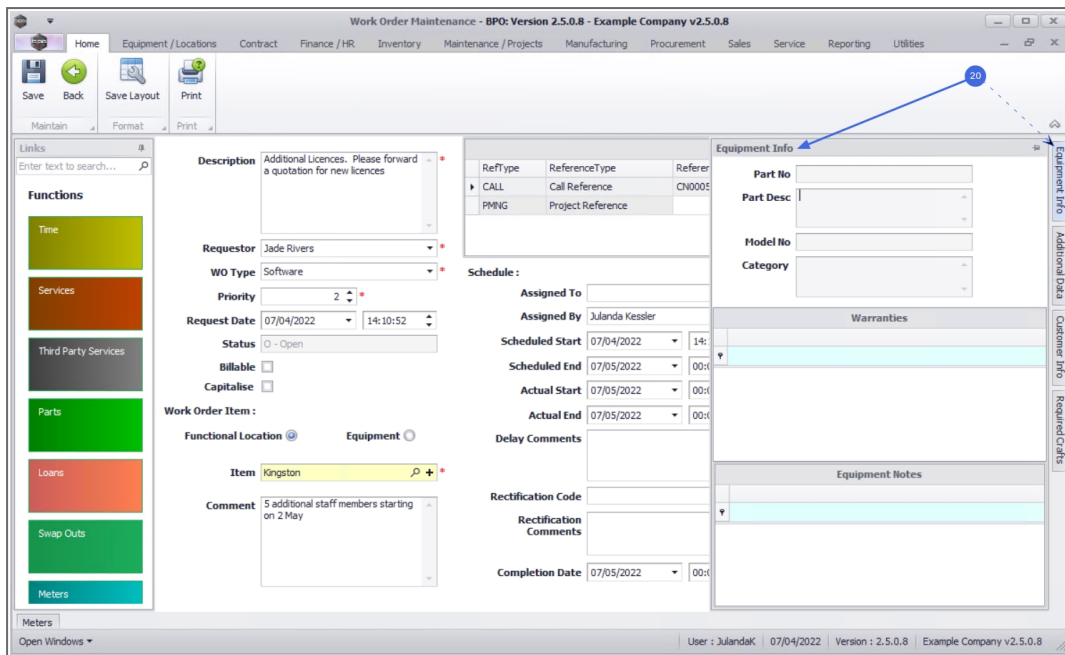
ADDITIONAL DATA TAB

- Click on the **Additional Data** tab to expand the **Additional Data** docking panel.
- You can view and rename the **Custom** fields **1 - 10**, that can be utilised for additional information required for this Work Order that is not covered on the Work Order screen. Rename the field labels to suit your company requirements.



EQUIPMENT INFO TAB

- Click on the **Equipment Info** tab to expand the **Equipment Info** docking panel.
- When addressing the **[+]** icon in the **Item** field, this panel can be viewed for additional information about the selected **equipment item**, including any warranties and/or equipment notes if applicable.



METERS TAB

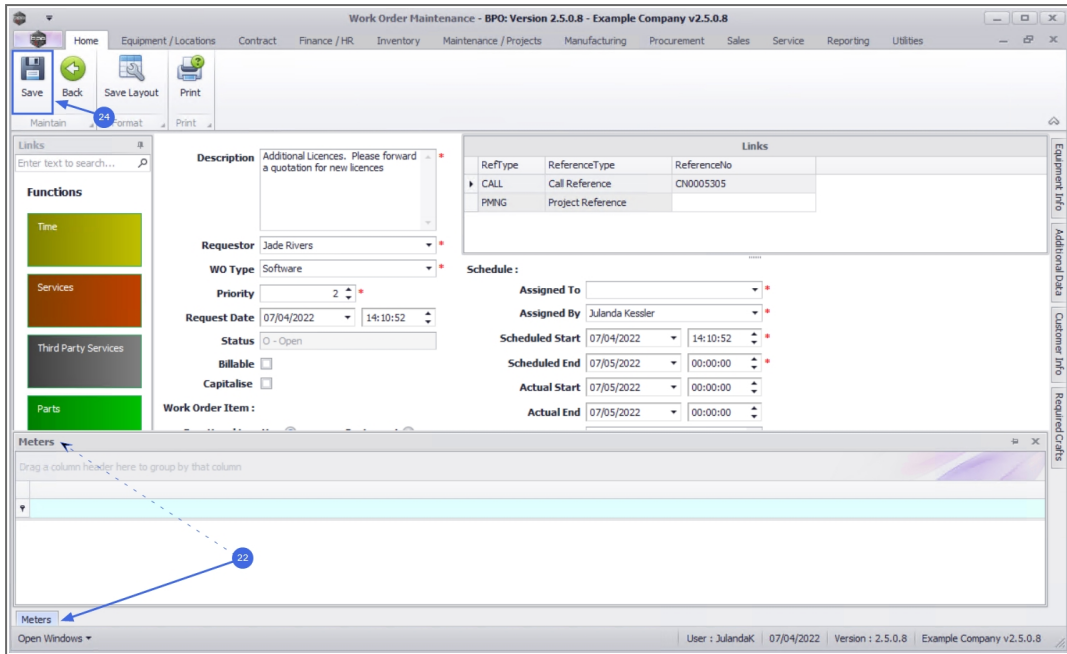
- Click on the Meters tab to expand the **Meters** docking panel.
- You will be able to view the meter history information for the Item referencing on the Work Order, if applicable.



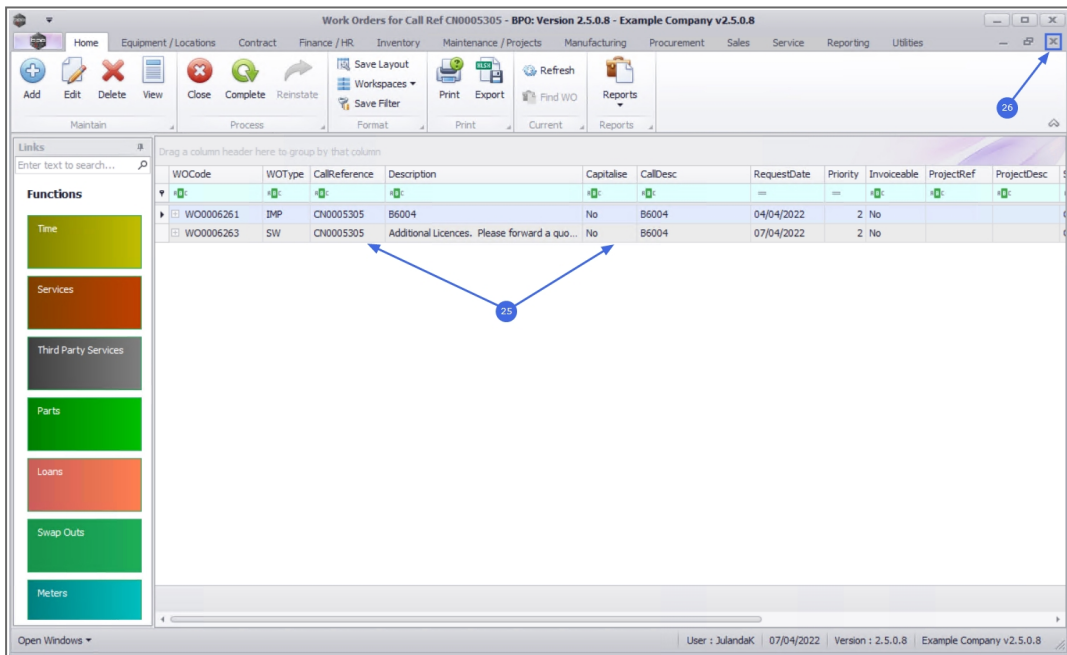
For a detailed handling of this topic refer to [Work Orders - Add a Work Order](#)

SAVE WORK ORDER

- When you have finished adding details to the screen, click on **Save**.



- You will return to the **Work Orders for Call Ref** screen where you can view the linked work order
- **Close** the screen to return to the **Call maintenance** screen.

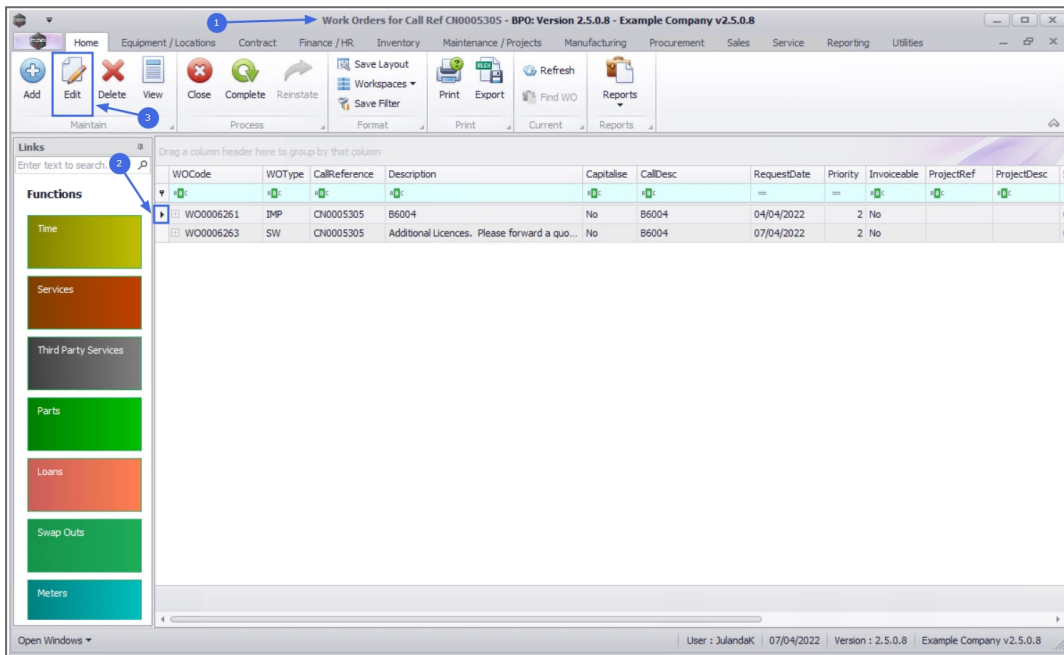


EDIT WORK ORDER

- From the **Work Orders for Call Ref** [call reference number] screen,
- Click on the **row** of the work order you wish to edit.
- Click on **Edit**.



Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.

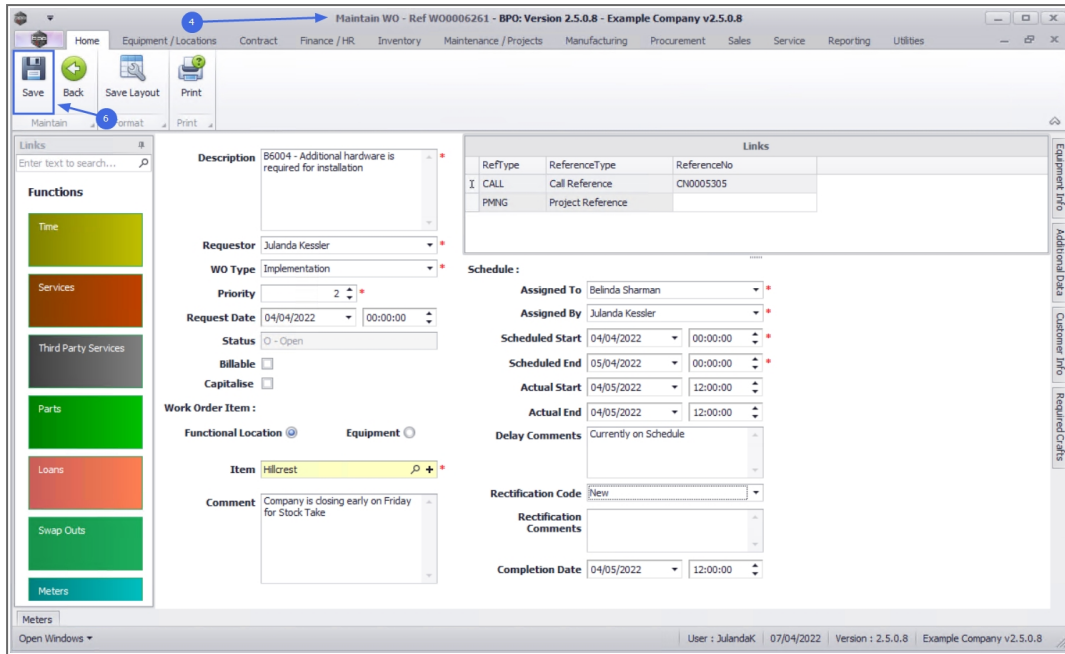


- " The Maintain WO - Ref [work order number] screen will be displayed. " on page 2
- You can make the changes to the **Work Order information** screen, **Required Crafts** tab or **Additional Data** tab as required.



For a detailed handling of this topic refer to [Work Orders - Add a Work Order](#)

- When you have made the necessary changes, click on **Save**.



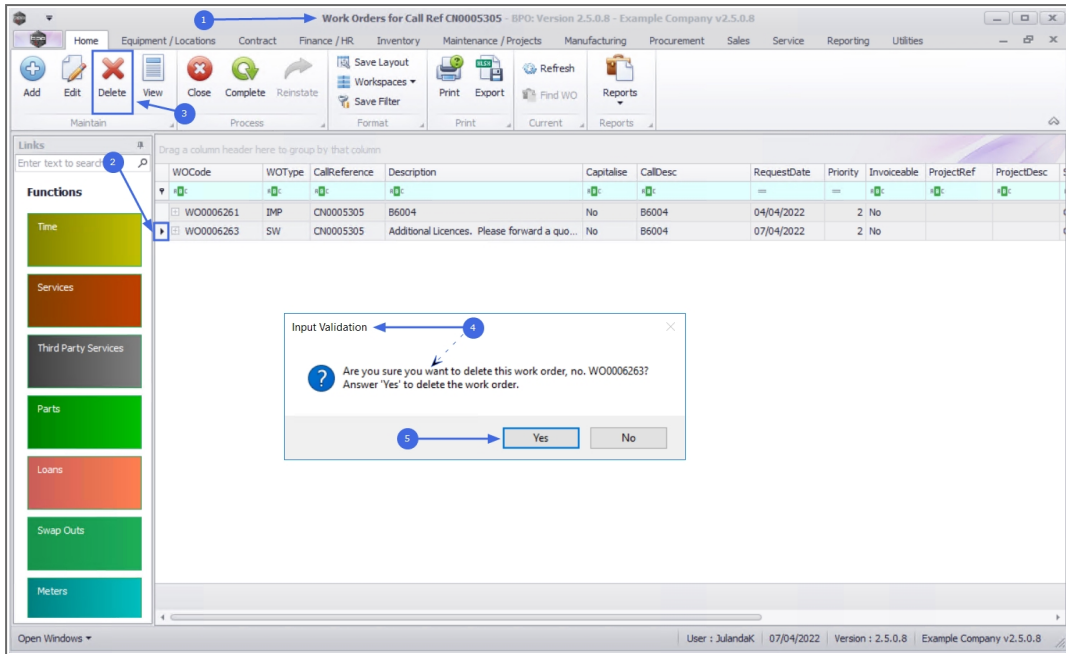
DELETE WORK ORDER

- From the **Work Orders for Call Ref** [call reference number] screen,
- Click on the **row** of the work order you wish to remove.
- Click on **Delete**.

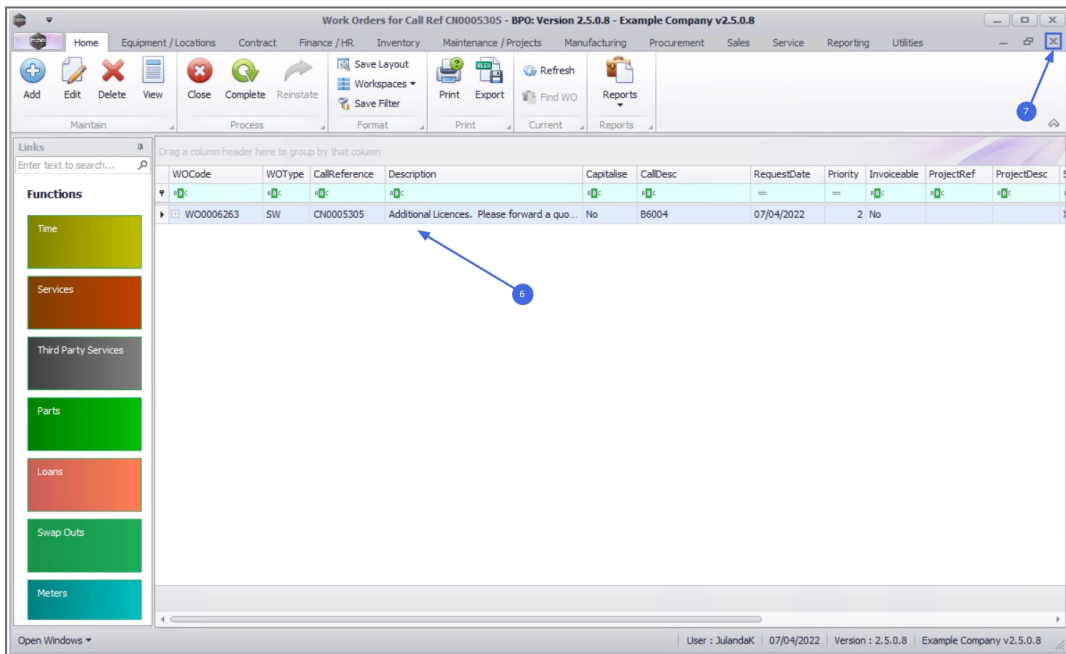


Short cut key: Right click to display the **All groups** menu list. Click on **Delete**.

- When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to delete this work order, no. [work order number]? Answer 'Yes' to delete the work order.**
- Click on **Yes**.

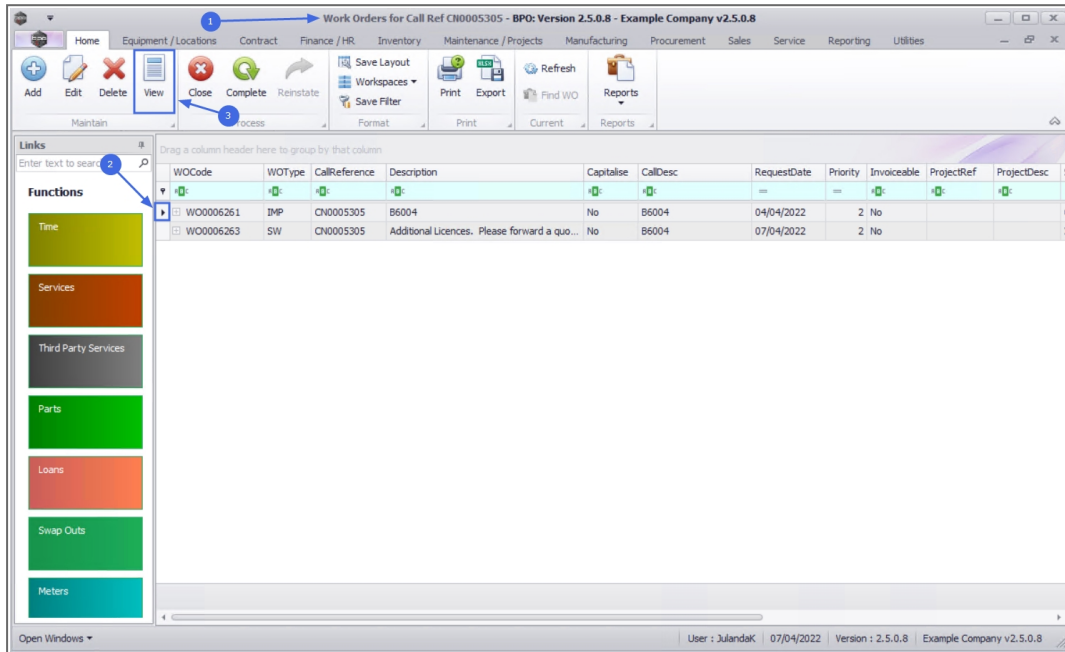


- The work order has been removed from the **Work Orders for Call Ref** screen.
- Click on the **Close** button to return to the Call maintenance screen.



VIEW WORK ORDER

- From the **Work Orders for Call Ref [call ref number]** screen,
- Click on the **row** of the work order you wish to view.
- Click on **View**.

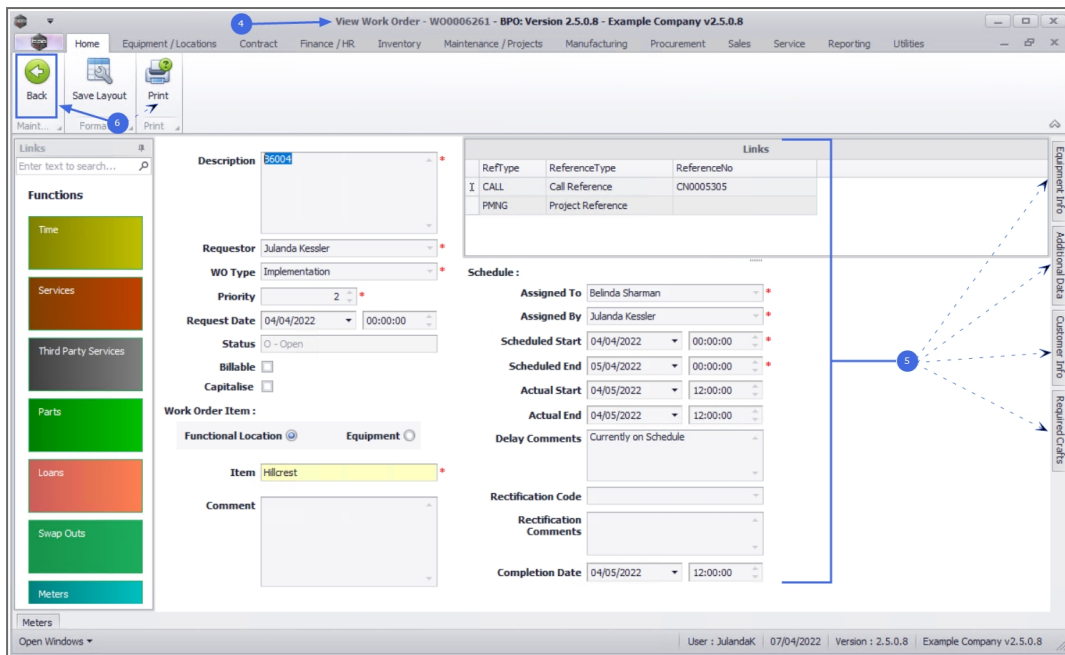


- The **View Work Order - [work order number]** screen will be displayed.



Note that only the **Back** button is available on this screen as this screen is view only.

- From here you can view the **Work Order details**, **Customer Info**, the **Required Crafts**, **Additional Data** or the **Equipment Info** for the work order.
- Click on **Back** to return to the Work Order, or
 - Click on **Print** to [Print the Work Order](#).



CLOSE WORK ORDER

All work order transactions must be completed, for instance issuing parts, invoicing etc., before a work order can be closed. The system will prevent you from closing the work order if a transaction still needs to be processed on the work order.

You must have successfully completed the work order, before it can be closed.

- From the **Work Orders for Call Ref** [call ref number] screen will be displayed.
- Click on the **row** of the work order that needs to be closed.



Note that you will only be able to close a work order that has been completed.

- Click on **Close**.



Short cut key: Right click to display the **All groups** menu list. Click on **Close**.

- When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to close this work order, no. [work order number]? Answer 'Yes' to close the work order.**
- Click on **Yes**.



For a detailed handling of this topic refer to [Work Orders - Close Work Order](#)

WOCODE	WOTYPE	CallReference	Description	Capitalise	CallDesc	RequestDate	Priority	Invoiceable	ProjectRef	ProjectDesc
WO0006261	IMP	CN0005305	B6004	No	B6004	04/04/2022	2	No		
WO0006263	SW	CN0005305	Additional Licences. Please forward a quo...	No	B6004	07/04/2022	2	No		

Scroll to view the **Status** for the Work Order in the Status column.

The Status has changed to **C - Closed**.

COMPLETE WORK ORDER

Work orders linked to a project should be completed when the work required has been done.

- The **Work Orders for Call Ref** [call reference number] screen will be displayed.
- Click on the **row** of the Work Order you wish to complete.
- Click on **Complete**.



Short cut key: Right click to display the **All groups** menu list. Click on **Complete**.

- When you receive the **Input Validation** to confirm;
 - **Are you sure you want to complete this work order, no. [work order number]? Answer 'Yes' to complete the work order.**
- Click on **Yes**.



For a detailed handling of this topic refer to [Work Orders - Complete a Work Order](#)

The screenshot shows the 'Work Orders for Call Ref' interface. The main window title is 'Work Orders for Call Ref CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8'. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Add, Edit, Delete, View, Close, Complete, Reinststate, Save Layout, Workspaces, Save Filter, Print, Export, Refresh, Find WO, and Reports. A table of work orders is displayed with columns: WOCODE, WOTYPE, CallReference, Description, Capitalise, CallDesc, RequestDate, Priority, Invoiceable, ProjectRef, and ProjectDesc. Two work orders are listed: WO0006261 (IMP) and WO0006263 (SW). An 'Input Validation' dialog box is open, asking 'Are you sure you want to complete this work order, no. WO0006261? Answer 'Yes' to complete the work order.' with 'Yes' and 'No' buttons. A sidebar on the left contains 'Functions' like Time, Services, Third Party Services, Parts, Loans, Swap Outs, and Meters. The status bar at the bottom shows 'User : JulandK | 07/04/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8'.

WOCODE	WOTYPE	CallReference	Description	Capitalise	CallDesc	RequestDate	Priority	Invoiceable	ProjectRef	ProjectDesc
WO0006261	IMP	CN0005305	B6004	No	B6004	04/04/2022	2	No		
WO0006263	SW	CN0005305	Additional Licences. Please forward a quo...	No	B6004	07/04/2022	2	No		

REINSTATE WORK ORDER

If you need to process or change something on a closed work order, you will need to **reinstate the work order**, add or edit the details as required, then close it again when done.

Some of the reasons for reinstating a work order are:

- To credit a cancelled order.
- To credit incorrect stock and re-invoice correct stock.
- To credit over supply.
- To credit and re-invoice correct selling price.

Only closed work orders can be reinstated.

- From the **Work Orders for Project Ref** [project ref number] screen will be displayed.
- Click on the **row** of the closed work order that needs to be reinstated.



Note the status for the work order as **C - Closed**.

- Click on **Reinstate**.



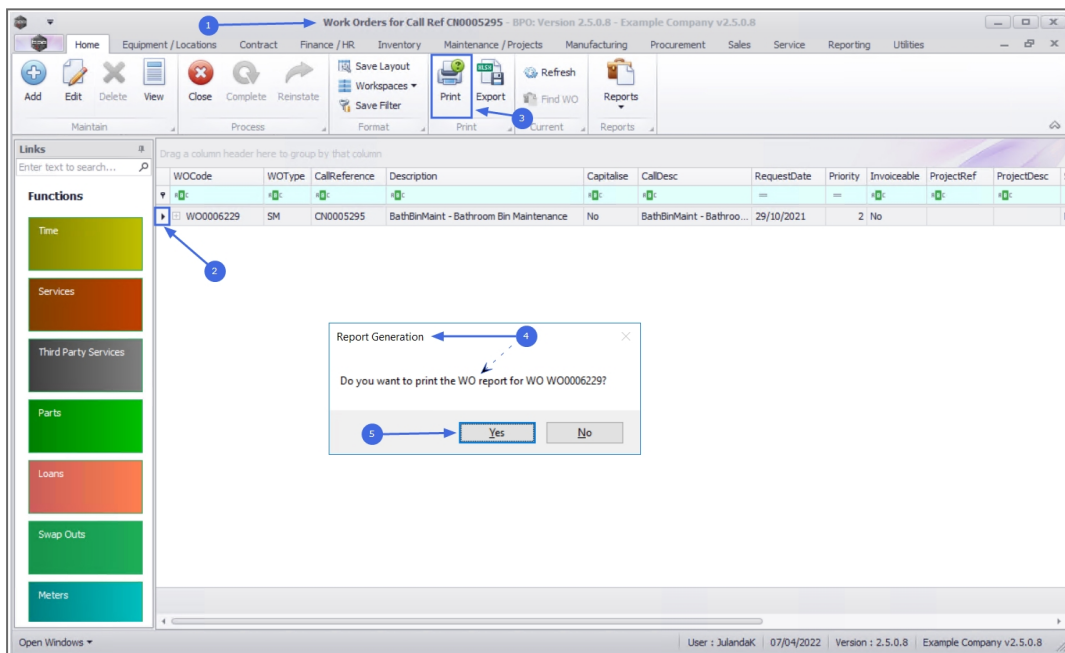
Short cut key: Right click to display the All groups menu list. Click on Reinstate.

- When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to re-instate this work order, no. [work order number]? Answer 'Yes' to re-instate the work order.**
- Click on **Yes**.

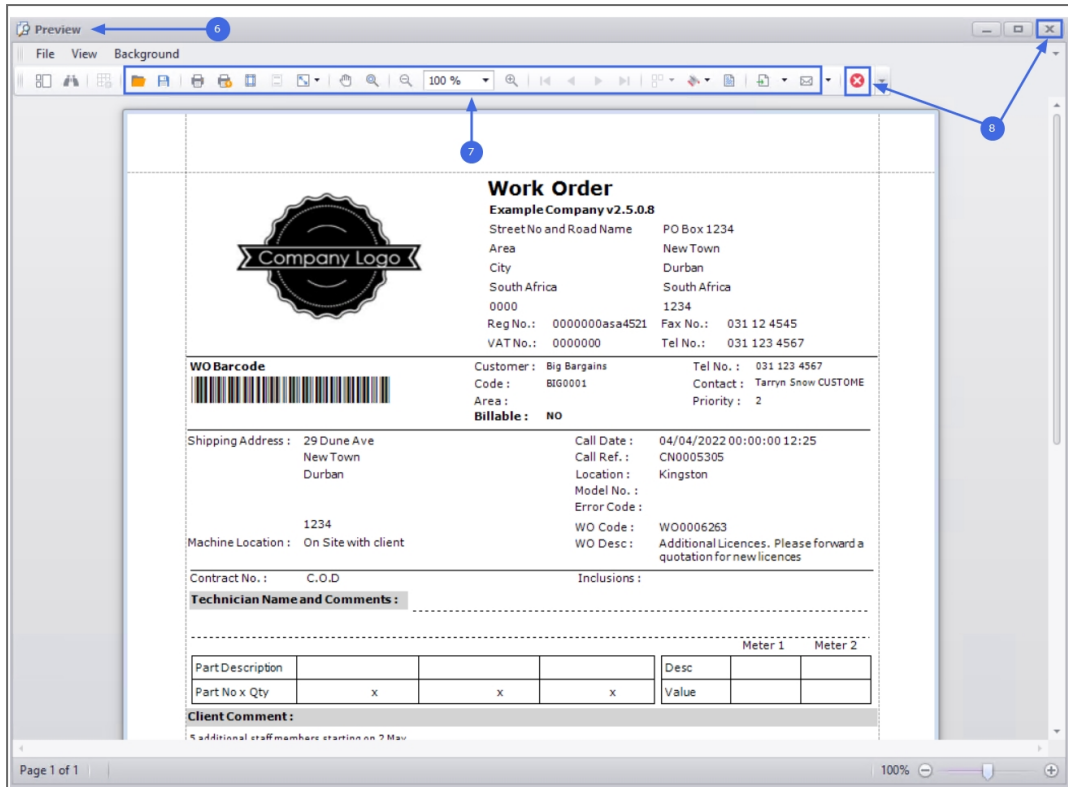


PRINT WORK ORDER

- From the **Work Orders for Call Ref [call reference]** screen,
- Click on the **row** of the work order you wish to print the work order report for.
- Click on **Print**.
- When you receive the **Report Generation** message to confirm,
 - **Do you want to print the WO report for [work order number]?**
- Click on **Yes**.



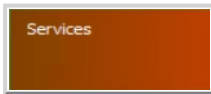
- The Work Order will display in the Reports **Preview** screen.
- From here you can make cosmetic changes to the Work Order, as well as **Save, Zoom, Add a Watermark, Export** or **Email**.
- **Close** the Report Preview screen when done.



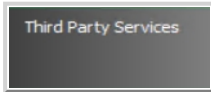
FUNCTION TILES



The [Times](#) tile will direct you to the **Time booking for Work Order** screen where you can **Add, Edit** and **Delete** Labour Time for a Work Order linked to a Project. Refer to [Work Orders - Time Booking](#)



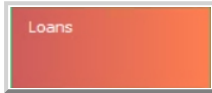
The [Services](#) tile will direct you to the **Internal services for WO Code** screen where you can **Add, Edit** and **Remove** an Internal Service from the Work Order. Refer to [Work Orders - Internal Services](#)



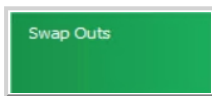
The [Third Party Services](#) tile will direct you to the **Service Request for WO Code** screen where you can **Add, Edit, Delete**, issue a **Requisition** and do **Billing** for the Work Order. Refer to [Work Orders - Third Party Service Request](#)



The [Parts tile](#) will direct you to the **Service Request for WO Code** screen where you can, **Add, Edit, Remove** an Internal Service to a Work Order, as well as view **Requisitions, Issues** and **Transfers**, maintain **Notes, Change the Warehouse, Remap a Part** or **Create a Part** on the Work Order. Refer to [Work Orders - Part Requests](#)



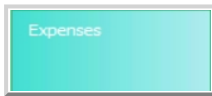
The [Loans tile](#) will direct you to the **Loan Requests for WO Code** screen where you can **Add, Edit, Delete** and view **Returns** on a loan request linked to the Work Order. Refer to [Work Orders - Loans](#)



The [Swap Outs tile](#) will direct you to the **Swap Outs for WO Code** screen where you can **Add** swap outs on a Work Order. Refer to [Work Orders - Swap Outs](#)



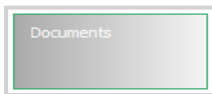
The [Meters tile](#) will direct you to the **Meters for WO Code** screen where you can view the list of meter readings against the work order. Refer to [Work Orders - Meters](#)



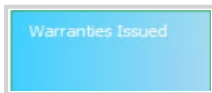
The [Equipment tile](#) will direct you to the **Expense Claims for WO Code** screen where you can **Add, Edit** and **Delete** an expense claim from the Work Order. Refer to [Work Orders - Expenses](#)



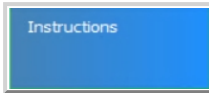
The [Travel tile](#) will direct you to the **Travel Claims for WO Code** screen where you can **Add, Edit** and **Delete** a travel claim from the Work Order. Refer to [Work Orders - Travel](#)



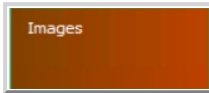
The [Documents tile](#) will direct you to the **Documents for Work Order** screen where you can **Add, Edit, Delete** and **View** a digital documents linked to a work order. Refer to [Work Orders - Documents](#)



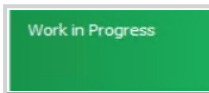
The [functions tile](#) will direct you to the **Issued Warranties for WO Code** screen where you can, **Add, Edit** and **Delete** a warranty linked to a work order. [Work Orders - Warranties Issued](#)



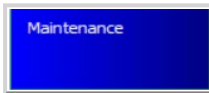
The functions tile will direct you to the **Instructions for WO Code** screen where you can **Add, Edit, Delete** and **Complete** an instruction for a Work Order. Refer to [Work Orders - Task Instructions](#)



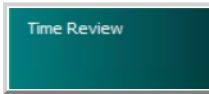
The functions tile will direct you to the **Images for WO Code** screen where you can view and **Print** the images linked to the Work Order. Refer to [Work Orders - Images](#)



The functions tile will direct you to the **Work in Progress for WO Code** screen where you can **Return, Invoice WO** and **Invoice Call(s)** linked to the Work Order. Refer to [Work Orders - Work in Progress \(WIP\)](#)

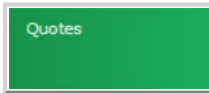


The functions tile will direct you to the **Maintenance Methodology for location** screen where you can **Add, Edit** and **Delete** a maintenance methodology from a Work Order. Refer to [Work Orders - Maintenance](#)

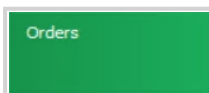


The functions tile will direct you to the **Time Not Billed for Work Order Code** screen where you can **Invoice WO, Invoice Project, Flag Reviewed** and set **SLA Time** linked to the Work Order. Refer to [Work Orders - Time Review](#)

PROCESSING TILES

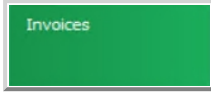


The [Quotes functions tile](#) will direct you to the **Sales Quotes for Work Order** screen where you can **Add, Edit, Delete, View, Accept, Reject, Covert** and **Clone** a Quote linked to a Work Order. Refer to [Work Orders - Sales Quotes](#)

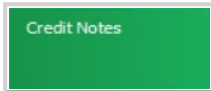


The [Orders functions tile](#) will direct you to the **Sales Orders for Work Order** screen where you can **Add, Edit, Delete, View, Create Invoice, Create New Deal, Add**

Items to WO, New Deal Project, Print Sales Order and Print a Proforma Invoice. [Work Orders - Orders](#)



The [Invoices functions tile](#) will direct you to the **Sales Invoices for Work Order** screen where you can **Add, Edit**, add a **Comment and Reference, Print** and **Send Invoices to Print Queue**. Refer to [Work Orders - Invoices](#)



The [Credit Notes functions tile](#) will direct you to the **Sales Credit Notes for Work Order** screen where you can **Add, Edit, Delete, View, Release for Approval, Remove from Approval, Approve Cr Note** and **Send Cr Notes to Print Queue**. Refer to [Work Orders - Credit Notes](#)

MNU.122.033