

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

## SERVICE

### CALLS – WORK IN PROGRESS

**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 [Call Centre Mode](#) notes.

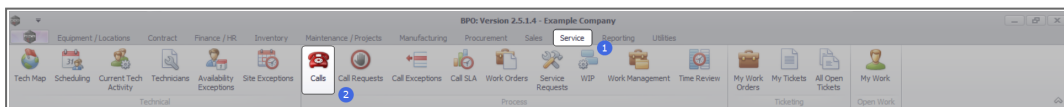
The Work in Progress (WIP) screen displays:

- **Parts** that have been issued or
  - **Third Party Services** that have been received
- but have not yet been invoiced.

If these items are **non** billable, the work order, call or project will **not** have been closed yet.

Return Requests can be raised for **Internal Assets** to return the item to the **Asset warehouse**.

**Ribbon Select Service > Calls**



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

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

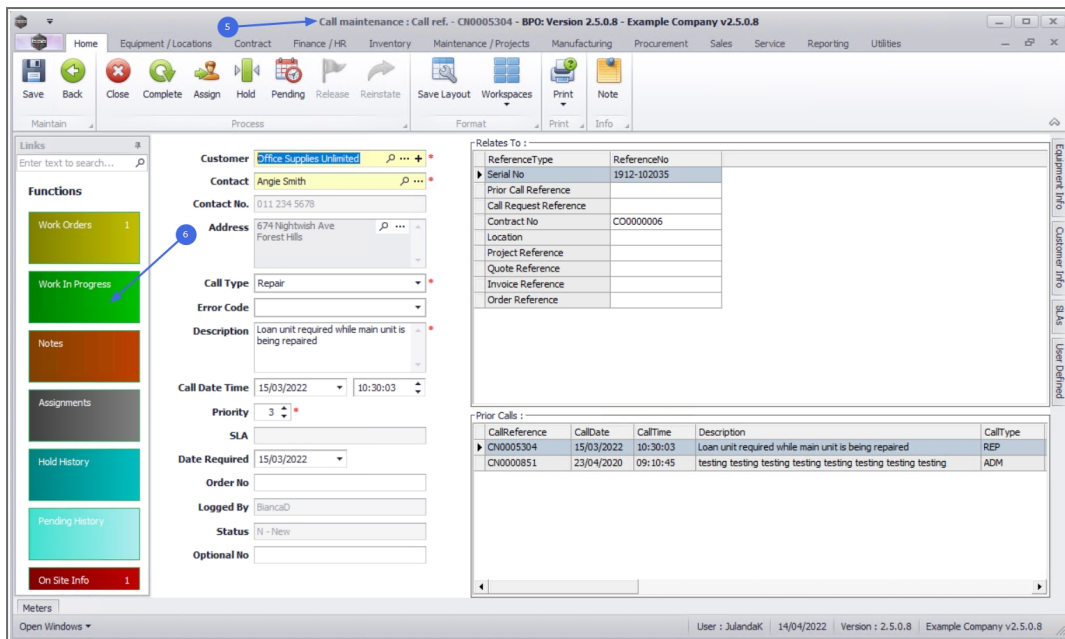


CallRef	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	12/12/2022	12:00:00	Awaiting Acceptance - Jon Hilson	Test account balance	CR	Change Request			107		3
BN CH001002	Sherwood Drive	12/12/2022	06:38:20	Awaiting Acceptance - Nery Thompson	Test call for account balance manual	DR	Select Call Type			107		3
BN CH001001	Young Electric	20/11/2022	11:29:19	Unassigned	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000992	Top Value Hire	20/10/2022	14:58:17	Awaiting Acceptance - Daniel Edgewood	Loan machine for temporary high volume printing requirement	SRV	Service				TOP123456	3
BN CH000991	Apple Juice Inc	04/10/2022	05:36:15	Unassigned	Contact Closure - C0000055	DR	Select Call Type					3
BN CH000989	Derton / Technologies	13/04/2022	09:00:00	Unassigned	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	02/06/2022	06:00:00	Unassigned	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/04/2022	06:00:00	Unassigned	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/04/2022	06:00:00	Unassigned	Call logged 5 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/04/2022	05:09:13	Unassigned	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Unassigned	Test elapsed hours - 2 day prior	TEST	Testing			AT000000		3
BN CH000983	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Unassigned	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
BN CH000982	Young Electric	18/04/2022	06:00:00	Unassigned	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	13:24:29	Awaiting Acceptance - Bianca Du Toit	Test with site manager email entered	ADM	Administration			107		3
BN CH000979	Hope Works (Pty) Ltd	18/11/2019	06:30:26	Awaiting Acceptance - Bianca Du Toit	Test another call email	ADM	Administration			0950191015		3
BN CH000978	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Awaiting Acceptance - Bianca Du Toit	Test new call for email description in body	CR	Change Request			0950191015		3
BN CH000977	Westwood Dynamic	29/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000976	Westwood Dynamic	22/11/2019	08:00:00	Unassigned	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	Unassigned	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	08:00:00	Unassigned	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	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000963	Westwood Dynamic	25/10/2019	08:00:00	Unassigned	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	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	08:00:00	Unassigned	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	Unassigned	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• Click on the **Edit** button.

• The **Call maintenance : Call ref - [call reference number]** screen will display.

• Click on the **Work In Progress** tile.



- The **Work in Progress for Call, Ref No : [call ref. number]** screen will be displayed.

The screen displays both **stock** or **internal assets** that have been issued, as well as **Third Party Services** that have been received

If the items or services are billable, then they have **not** been invoiced.

If the items are non-billable, the linked work order, call or project has **not** yet been closed.

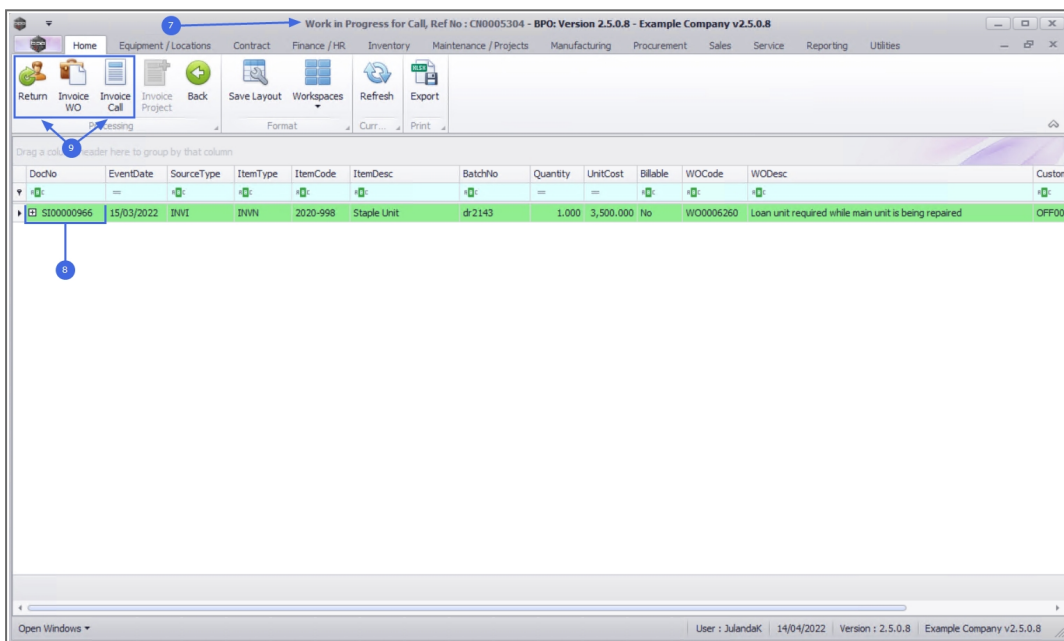
- The **Doc No** column displays the, Work in Progress reference number for a **part** with a **SI** prefix to the number.
  - A **service** Work in Progress will display as **SERVICE**.

## WIP PROCESSING

- From this screen, you can:
  - Do a **Return Request** for an item or service,
  - Invoice** a **work order**, or
  - Invoice Call**.



The Invoice Project button has been greyed out indicating that a Project cannot be Invoiced from this screen.

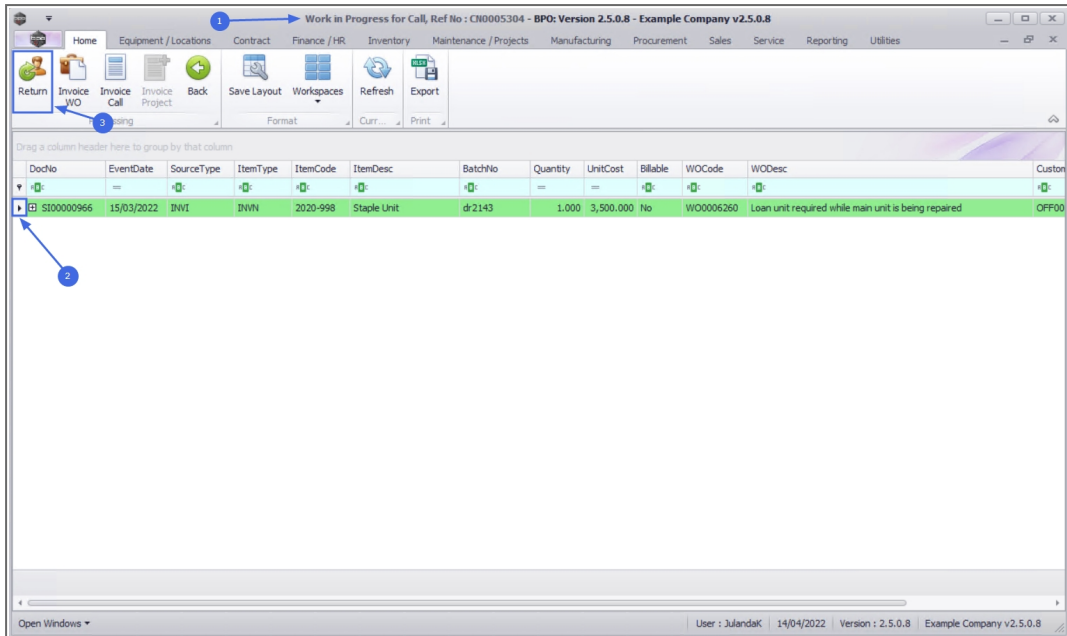


## RETURN REQUEST

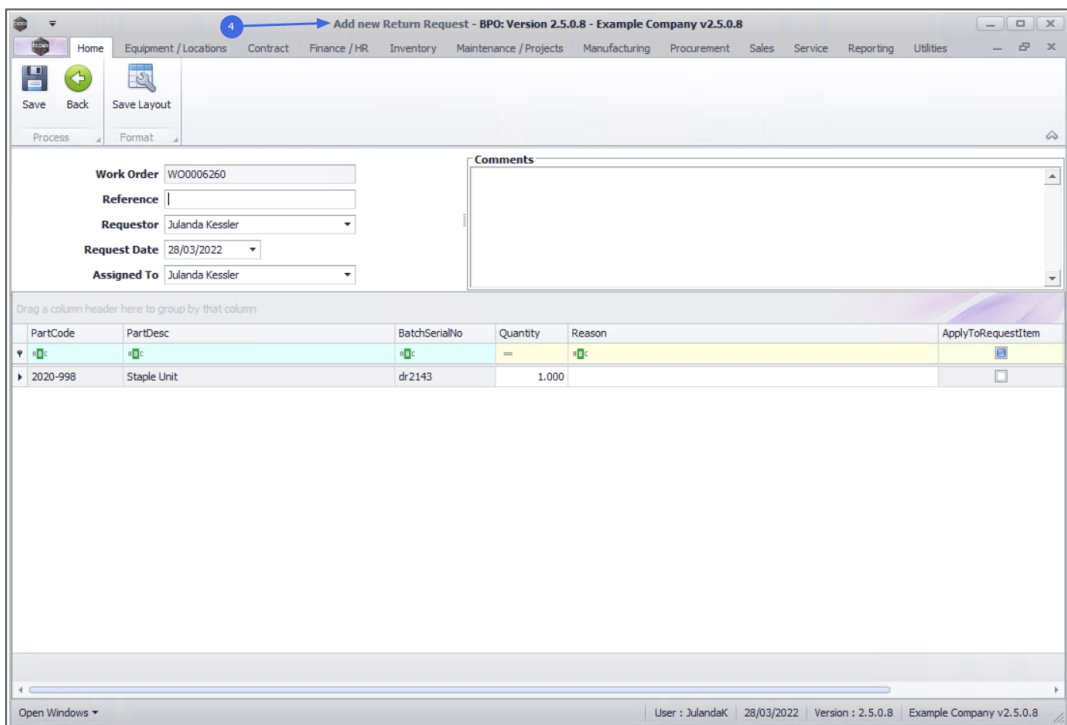
- From the **Work in Progress for Call, Ref No: [call ref number]** screen,
- Click on the **row** of the Service or Part you wish to return.
- Click on the **Return** button.



**Short cut key:** Right click to display the **Process** menu list. Click on **Return**.



- "The Add new Return Request screen will be displayed." on page 2

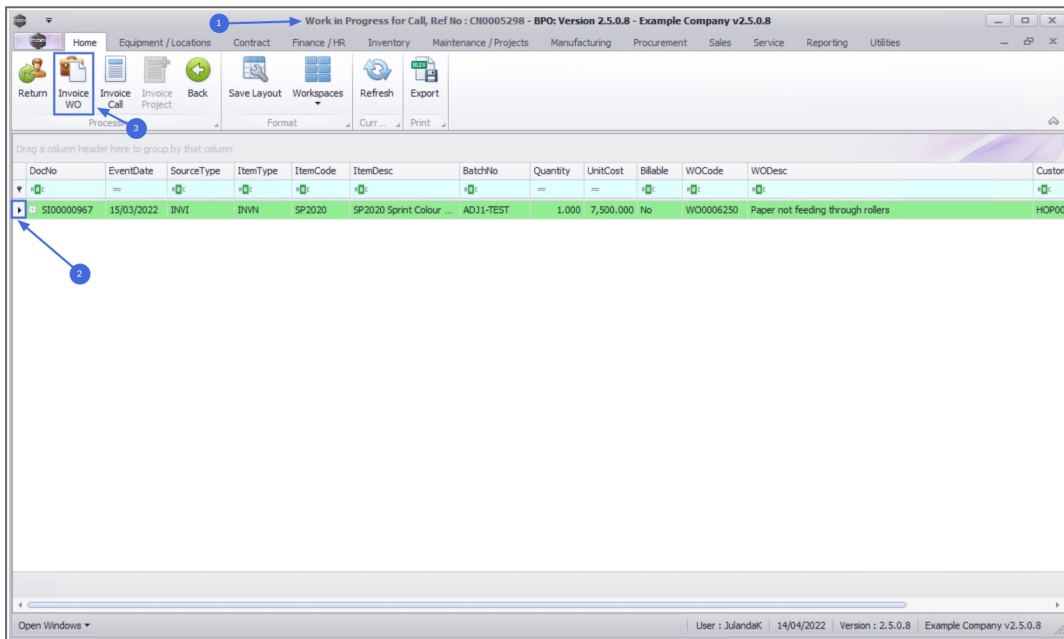


## INVOICE WORK ORDER

- From the **Work in Progress for Call**, Ref No. : [call ref number] screen,
- Click on the **row** of the Service or Part you wish to Invoice.
- Click on **Invoice WO**.



**Short cut key:** Right click to display the **Process** menu list. Click on **Invoice WO**.



- "The Add new Return Request screen will be displayed. " on page 2

**Customer Name:** Office Supplies Unlimited  
**Contact Name:** Commercial  
**Salesman:** Julanda Kessler  
**Billing Customer:** Office Supplies Unlimited  
**Invoice Currency:** South African Rand  
**Tax Rate:** 15.00  
**Reference:** [Empty]  
**Status:** New  
**Date & Time:** 28/03/2022 14:25:10  
**Billing address:** [Empty]  
**Shipping address:** [Empty]  
**Billing Contact:** [Empty]  
**Exchange Rate:** 1

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Expenses	ON	Over night stay ...	Over night stay as inst...			1.000	750.000	15.000	0.000	862.500	862.500
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Expenses	TOLL	Marianhill Ridge, ...	Marianhill Ridge, Toll to ...			1.000	27.000	15.000	0.000	31.050	31.050
	Warranty	12MSW	12 Month Suppl...	12 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000

**Summary:**  
**Sub Total:** 955.65  
**VAT:** 143.35  
**Grand Total:** 1,099.00

## INVOICE CALL

- From the **Work in Progress for Call**, Ref No: [call ref number] screen,
- Click on the **row** of the Service or Part that you wish to invoice.
- Click on **Invoice Call**.



**Short cut key:** Right click to display the **Process** menu list. Click on **Invoice Call**.



- "Invoice Header" on page 2

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