

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 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.

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 Asset**s to return the item to the **Asset warehouse**.

Ribbon Select Service > Calls



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

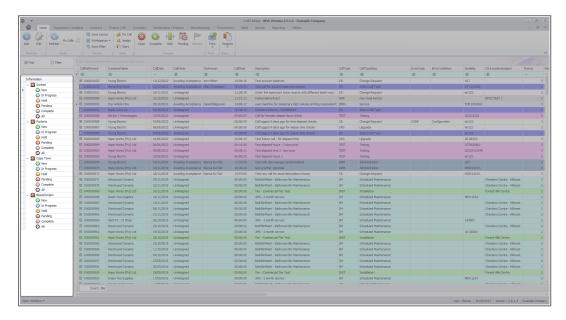
¹BPO2 v2.5.1.3 or higher

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 04/07/2024



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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.



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



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• Click on the **Edit** button.

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



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

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Home		7		Work in	Progress for	r Call, Ref I	lo : CN0005304 ·	BPO: Versi	on 2.5.0.8	- Example	Company va	.5.0.8					x
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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.



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• "The Add new Return Request screen will be displayed. " on

page 2

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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.

P Short cut key: Right click to display the Process menu list. Click on Invoice WO. v2.5.0.8 Inve Return Invoice 2 ۲ 🔁 4 Refresh Export Invoice Back Save Layout Workspaces WODe 9 FOC R 🛛 C 0 I SI 14/04/2022 Version : 2.5.0.8 Example Con pany v2.5.0.

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



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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.



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• "Invoice Header" on page 2

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