

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

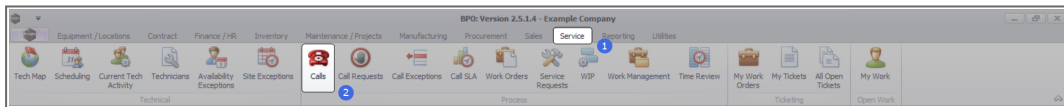
SERVICE

CALLS – ON SITE INFO

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.

On Site Info is the Equipment Asset Listing screen that has been filtered to only display serialised items that belong to the customer (customer assets) or internal assets that are on contract with the customer.

Ribbon Select Service > Calls



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

¹BPO2 v2.5.1.3 or higher

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
EN000103	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balances	CR	Change Request			107		3
EN000102	Salemfield Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			107		3
EN000101	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			en123		3
EN000096	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Barcode	IGR	New Deal Rental				BPQZ TEST 1	3
EN000092	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SERV	Service				TOP1234OLD	3
EN000091	Asda Java Inc	24/03/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
EN000089	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN000088	Young Electric	12/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN000087	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN000086	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN000085	Hope Works (Pty) Ltd	18/04/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
EN000084	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT200000		3
EN000083	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN23415946		3
EN000082	Young Electric	18/04/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN000076	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACH	Administration			107		3
EN000074	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ACH	Administration			095010155		3
EN000072	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN000071	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000070	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000069	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN000068	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN000067	Westwood Dynamic	16/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000066	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000065	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000064	Red P.C. IT Shop	20/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN000063	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000062	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
EN000061	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN000060	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000059	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000058	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000057	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000056	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloest	2
EN000055	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN000054	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 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.

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

CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CHN001003	Young Electric	12/12/2022	12:09:10	Awaiting Acceptance - Ann Hibben	Test account balance	CR	Change Request			107		3
BN CHN001002	Silverleaf Drive	12/12/2022	09:38:20	Awaiting Acceptance - Nary Thompson	Test call for account balance manual	CR	Select Call Type			107		3
BN CHN001001	Young Electric	20/11/2022	11:29:19	Unassigned	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPQZ TEST 1	3
BN CHN000992	Top Vehicle Hire	20/10/2022	14:58:17	Awaiting Acceptance - Daniel Edgewood	Loan machine for temporary high volume printing requirement	SERV	Service				TOP1234567	3
BN CHN000991	Apdx Lutz Inc	04/03/2022	09:36:15	Unassigned	Contact Closure - C0000055	CR	Select Call Type					2
BN CHN000989	Derton / Technologies	13/04/2022	09:00:00	Unassigned	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CHN000988	Young Electric	03/06/2022	09:00:00	Unassigned	Call logged 5 days ago for time elapsed check	CR	Change Request	CONF	Configuration			3
BN CHN000987	Young Electric	06/04/2022	06:00:00	Unassigned	Call logged 4 days ago for elapse time check	LPG	Upgrade			an123		3
BN CHN000986	Young Electric	07/04/2022	09:00:00	Unassigned	Call logged 5 days ago for elapse time check	CR	Select Call Type			an123		3
BN CHN000985	Hope Works (Pty) Ltd	10/04/2022	06:00:13	Unassigned	Test future call - for elapsed time	LPG	Upgrade			20-98765		3
BN CHN000984	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Unassigned	Test elapsed hours - 2 day prior	TEST	Testing			AT000000		3
BN CHN000983	Hope Works (Pty) Ltd	06/04/2022	06:00:31	Unassigned	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
BN CHN000982	Young Electric	10/04/2022	06:00:35	Unassigned	Test elapsed hours 1	TEST	Testing			an123		3
BN CHN000981	Young Electric	10/11/2019	11:24:29	Awaiting Acceptance - Bianca Du Toit	Test with site manager email entered	ADM	Administration			107		3
BN CHN000974	Hope Works (Pty) Ltd	10/11/2019	06:30:20	Awaiting Acceptance - Bianca Du Toit	Test another call email	ADM	Administration			095011015		3
BN CHN000972	Hope Works (Pty) Ltd	10/11/2019	15:57:00	Awaiting Acceptance - Bianca Du Toit	Test new call for email description in body	CR	Change Request			095011015		3
BN CHN000971	Westwood Dynamic	20/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000970	Westwood Dynamic	22/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CHN000968	Green Tea Supplies	16/11/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CHN000967	Westwood Dynamic	15/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000966	Westwood Dynamic	08/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000965	Westwood Dynamic	02/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000964	Hack PC - IT Shop	26/10/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CHN000963	Westwood Dynamic	25/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CHN000961	Hope Works (Pty) Ltd	10/10/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CHN000960	Westwood Dynamic	10/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000959	Westwood Dynamic	11/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000958	Westwood Dynamic	04/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000957	Westwood Dynamic	27/09/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000956	Westwood Dynamic	20/09/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CHN000955	Hope Works (Pty) Ltd	10/09/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CHN000954	Green Tea Supplies	17/09/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Edit** button.

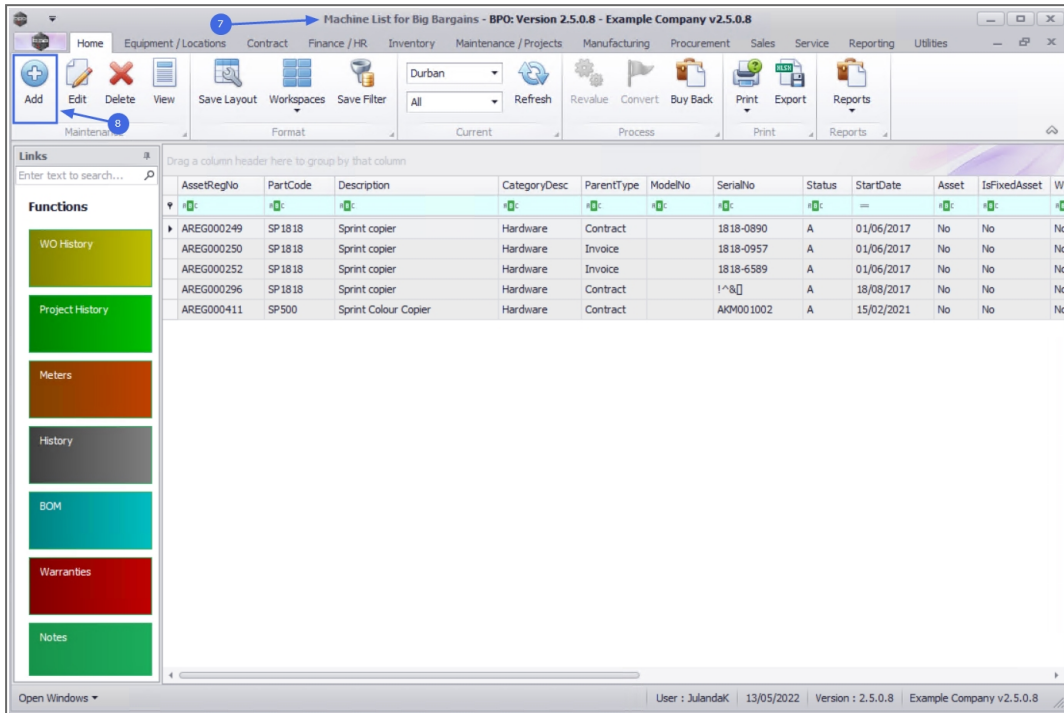
- The **Call maintenance : Call ref - [call reference number]** screen will display.
- Click on the **On Site Info** tile.

ON SITE INFO LISTING

- The **Asset listing or Machine List** for [Customer Name] screen will be displayed.

ADD EQUIPMENT

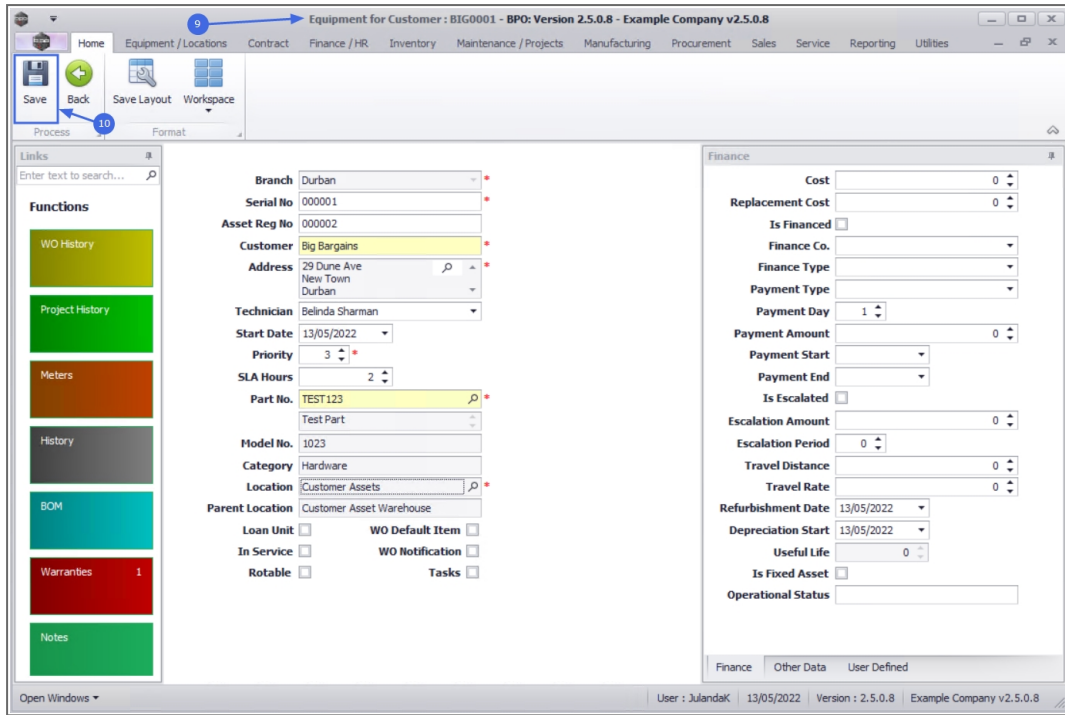
- Click on **Add**.



- The **Equipment for Customer : [customer code]** screen will be displayed.
- Add the Customer asset details as required and click on **Save**.



For a detailed handling of this topic refer to [Assets - Add Customer Asset Details](#)



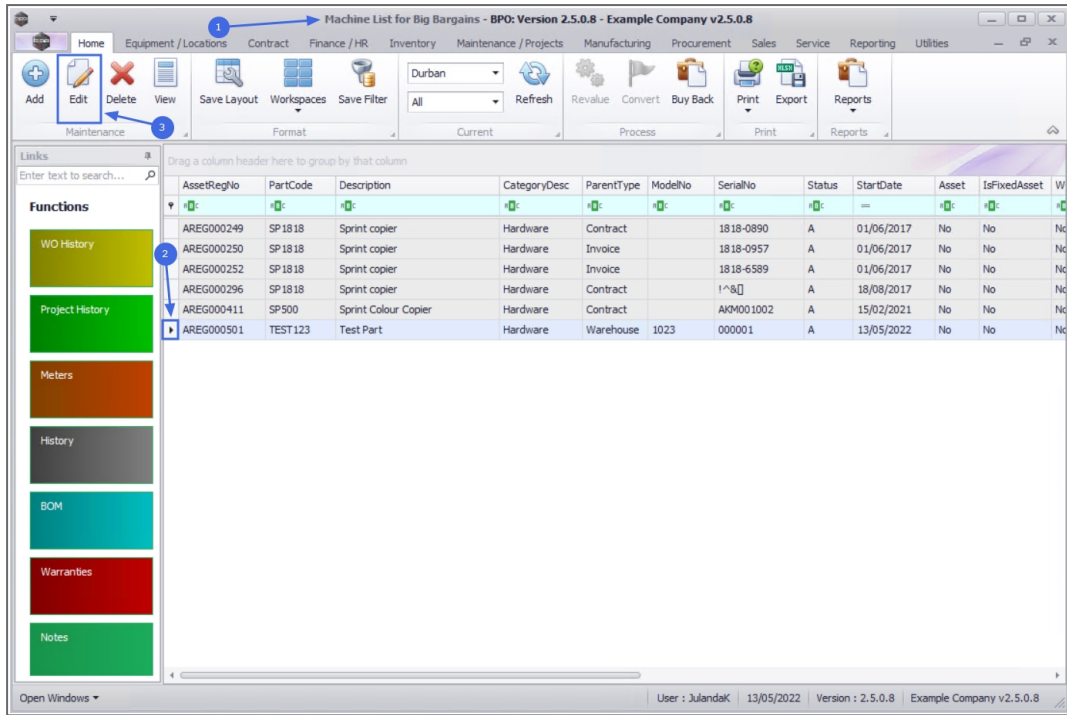
EDIT EQUIPMENT

After an asset is created, you may wish to edit certain attributes and details of the asset. Only certain asset details can be edited. You may have [user security rights](#) set in your [company configuration](#) whereby a control may be applied to these editing rights. For example, only a manager can edit certain details, for example, incorrect serial number input (which affects stock reports) but an administrator can edit other less impactful details.

It is important to note that if the serial number is edited for a company asset, [all](#) stock reports will be affected.

Explanations for all the **Details** and **Finance** fields can be found in [Introduction to Assets](#).

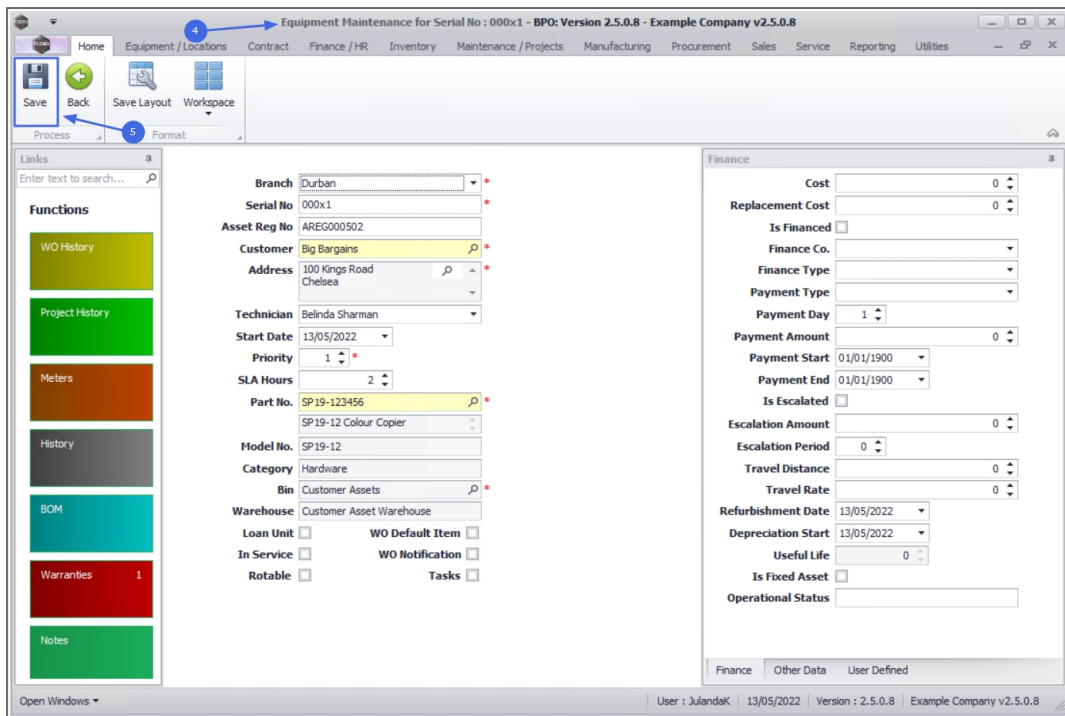
- From the **Machine List for [customer name]** screen,
- Click on the **row** of the asset detail you wish to make changes to.
- Click on **Edit**.



- The **Equipment Maintenance for Serial No : [serial number]** screen will be displayed.
- Make the required changes to the asset details and click on **Save**.

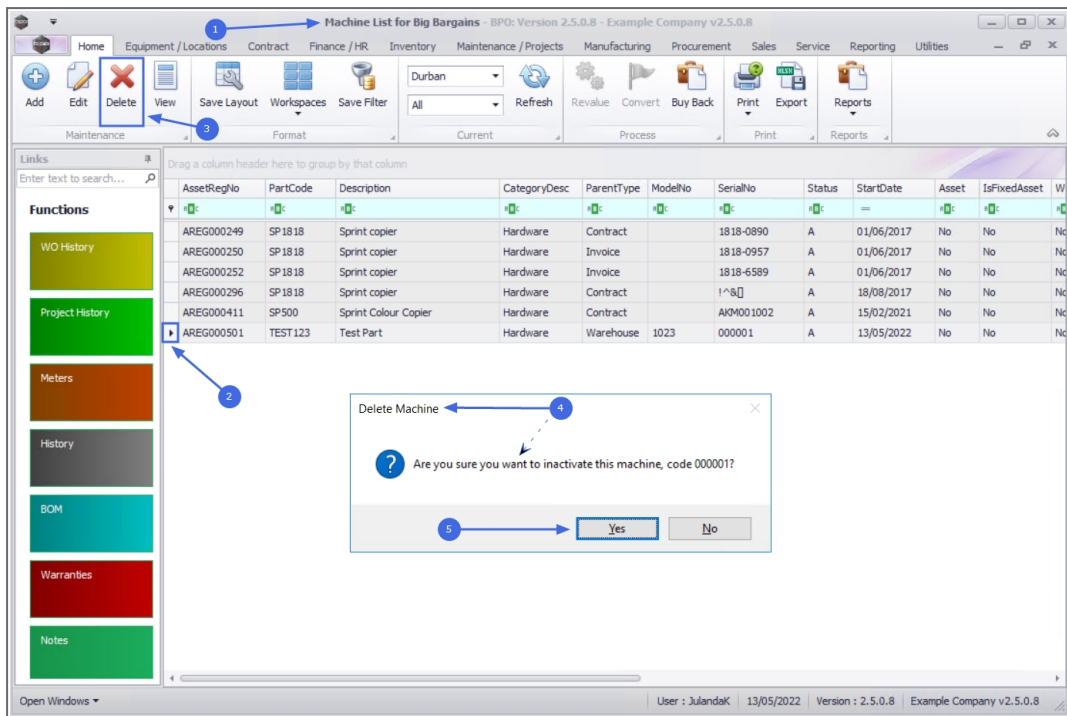


For a detailed handling of this topic refer to [Assets - Edit - Asset Details](#)



DELETE EQUIPMENT

- From the **Machine List for [customer name]** screen,
- Click on the **row** of the asset you wish to remove,
- Click on **Delete**.
- When you receive the **Delete Machine** message to confirm;
 - **Are you sure you want to inactivate this machine, code [serial number]?**
- Click on **OK**.

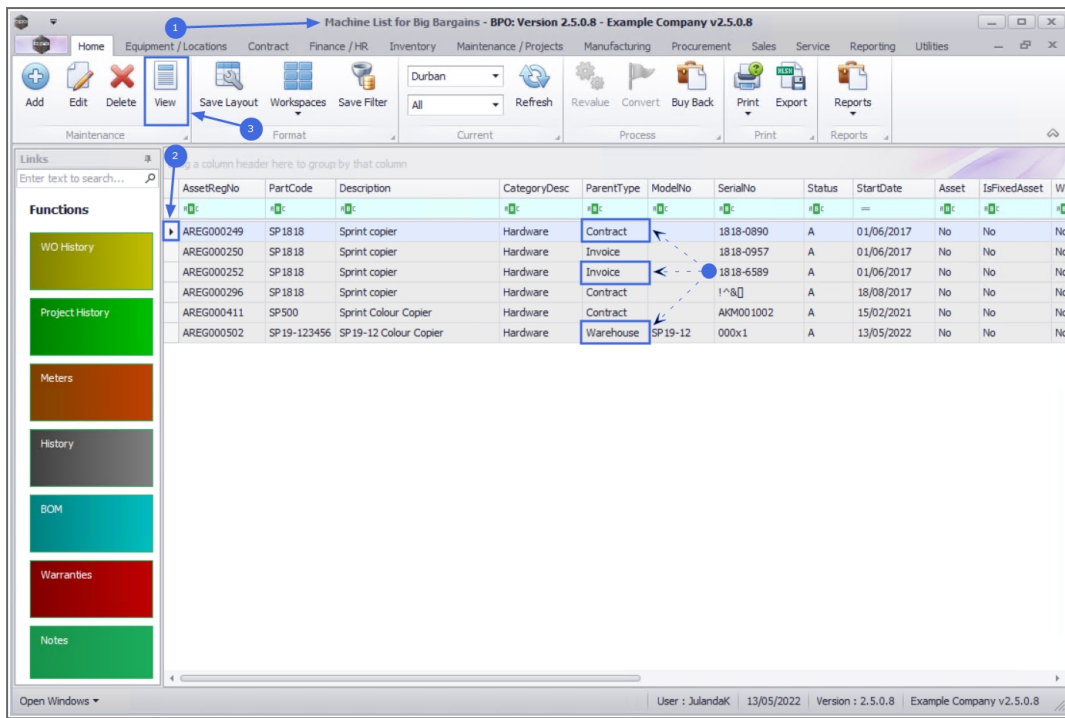


VIEW EQUIPMENT

- On the **Machine List for [customer name]** screen,
 - Note that there are 3 potential **Parent Types**;
 - Contract,
 - Invoice, and
 - Warehouse
 - Each of the Parent Types will affect which fields and field content will display on the screen.
- Click on the **row** of the customer asset you wish to view.
- Click on **View**.



For a detailed handling of this topic refer to [View Client Machine](#)

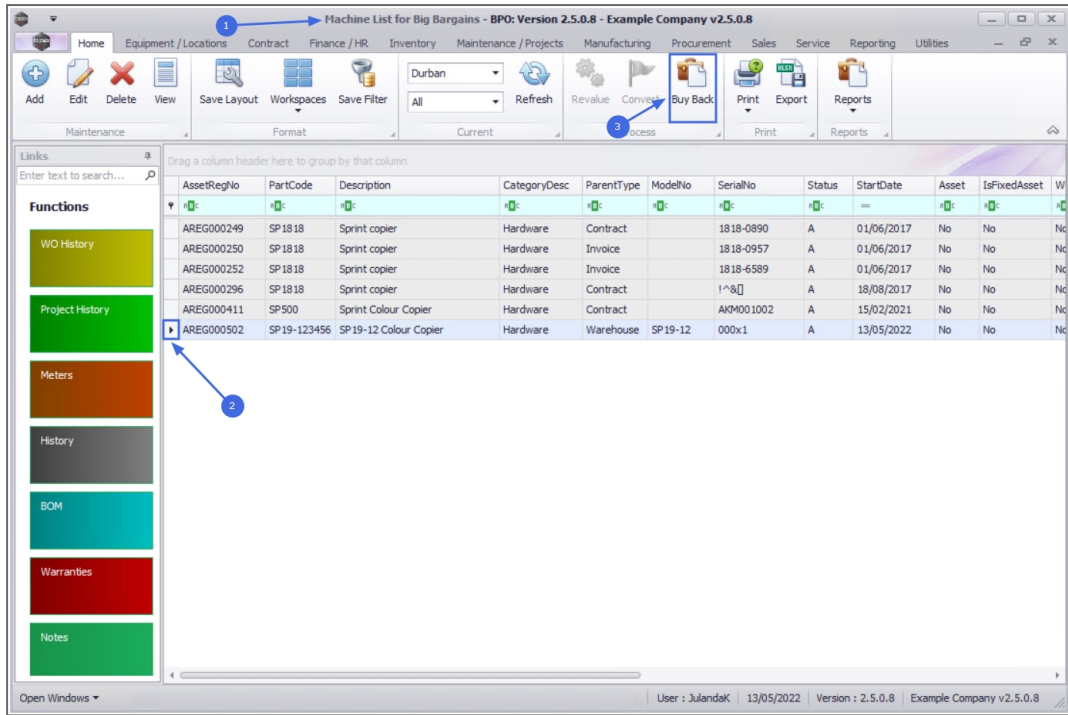


BUY BACK

Use this process only if;

- A Stock item or an Internal Asset has been incorrectly loaded as a Customer Asset
- A Contract is ending and the customer asset is to become the company property.

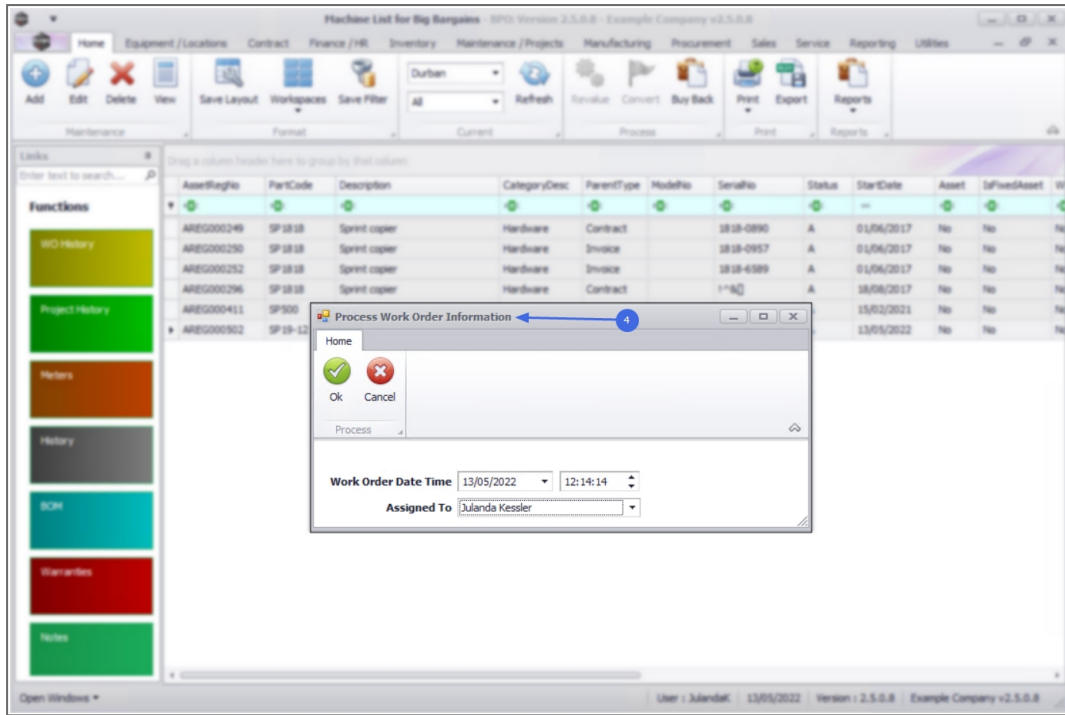
- From the **Machine List for [customer name]** screen,
- Click on the **row** of the asset you wish to buy back.
- Click on **Buy Back**.



- The **Process Work Order Information** screen will display.



Refer to **"Add Work Order Details"** on page 4 for a detailed handling of this topic.

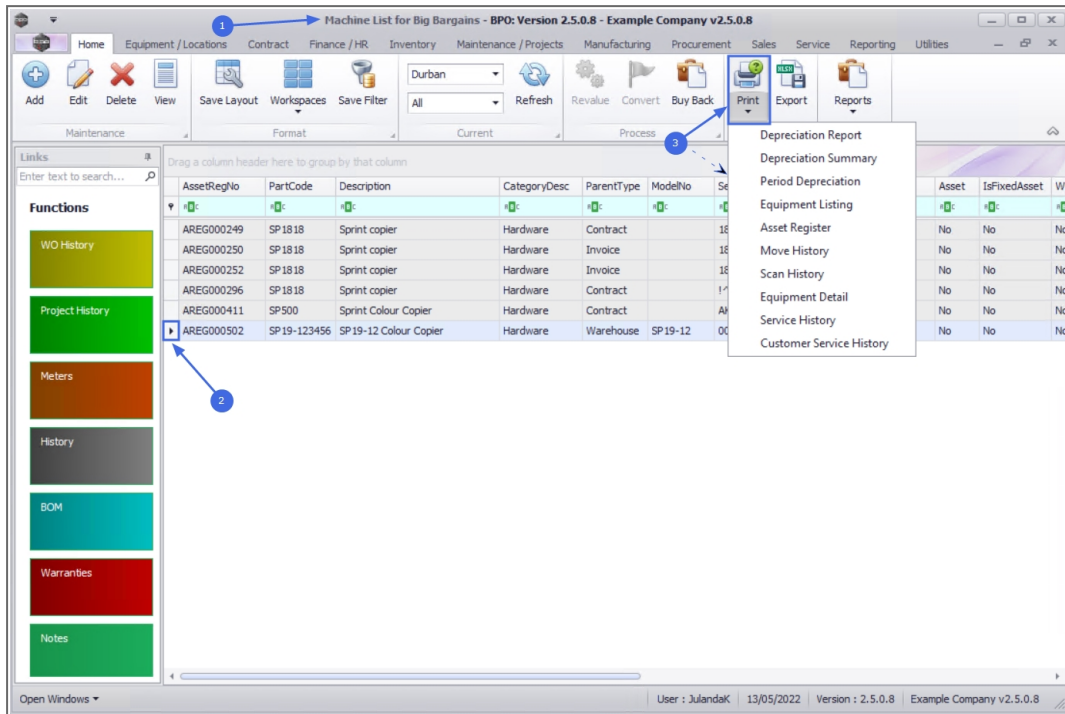


PRINT

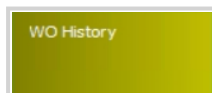
The Print option from the Machine List for Customer screen, will display a list of reports that can be generated and printed for an asset.

- From the **Machine List for [customer name]** screen.
- Click on the **row** of the asset you wish to print a report for.
- Click on **Print** to display the reports drop-down list.
- Click on the **Report** you wish to generate.
 - [Assets - Print - Depreciation Report](#)
 - [Assets - Print - Depreciation Summary Report](#)
 - [Assets - Print - Period Depreciation Report](#)
 - [View Asset Listing Report](#)
 - [Assets - Print - Asset Register Report](#)
 - [View Asset Movement History Report](#)
 - [View Asset Scan History Report](#)

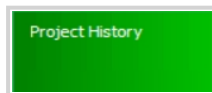
- [View Asset Detail Report](#)
- [Assets - Print - Service History Report](#)



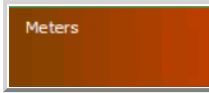
FUNCTION TILES



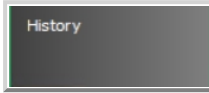
The [Work Order History](#) tile will direct you to the Work Orders for machine screen where you can **Add, Edit, Delete** and **View** a Work Order linked to the asset, as well **Close, Complete** and **Reinstate** a Work Order. Refer to [Introduction to Work Orders](#)



The [Project History](#) tile will direct you to the Project Listing for equipment screen where you can **Add, Edit, Apply** a **Project Methodology, Adjust Project Baseline** or **Close** a **Project**, as well as view **Employee and Project Time** and generate a **Progress Report** and **Print** a **Project Delivery Note**. Refer to [Introduction to Projects](#)



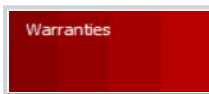
The [Meters](#) tile will direct you to the Meter Listing for Serial No screen where you can **Add, Delete** and **Reset a Reading**. Refer to [Assets - Meters - Add](#)



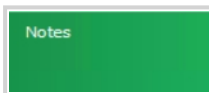
The [History](#) tile will direct you to the Transaction History for Equipment screen where you can **view** the history trail for a serialised equipment item. Refer to [Asset History](#)



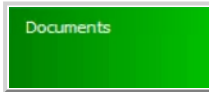
The [BOM](#) tile will direct you to the BOM Listing for equipment screen where you can **Add, Delete** and **View** the linked Bill of Materials. Refer to [Asset Bill of Materials](#)



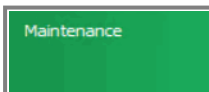
The [Warranties](#) tile will direct you to the Warranties for Equipment screen where you can **Add, Edit** and **View** the warranties linked to an item. Refer to [Assets - Warranties - View, Add, Edit](#)



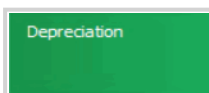
The [Notes](#) tile will direct you to the Notes Listing for Serial No screen where you can **Add** and **view** notes and comments recorded to a particular asset. Refer to [Assets - Notes - View, Add](#)



The [Documents](#) tile will direct you to the Documents for Equipment screen where you can **Add, Edit, Delete** and **View** the digital documents linked to an Asset. Refer to [Equipment Documents](#)



The [Maintenance](#) tile will direct you to the Maintenance Methodology for Asset screen where you can **Add, Edit** and **Delete** a maintenance task issued. Refer to [Link a Task](#)



The [Depreciation](#) tile will direct you to the Asset Depreciation screen where you can **view** the depreciation details for an Asset. Refer to [Asset Depreciation History](#)

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