

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

SERVICE

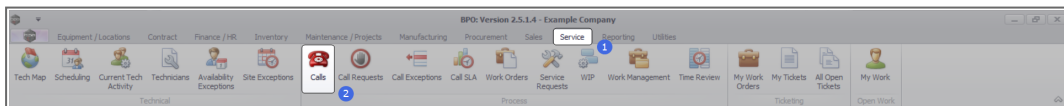
CALLS – TIME REVIEW

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.

Time review enables managers to allocate **regular** time logged by employees as **SLA** or **non billable** time. For example, if an employee books **4** hours against a work order, and the manager knows that the task should only require **2** hours to complete, then the manager can allocate **2** hours as Billable or **SLA** hours and the remaining **2** hours as **Non Billable** hours in the Time Review screen.

The [Time Review flag](#) must be set to **Yes** in **Configurator**.

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	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Salemfield Drive	13/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			107		3
EN0001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			107		3
EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		11:01:11	Printer/Batch Control	SRV	New Deal Rental			107		3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		06:58:15	Contact Closure - C0000054	SR	Select Call Type			107		3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	13/04/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	107		3
EN0000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			107		3
EN0000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			107		3
EN0000985	Hope Works (Pty) Ltd	18/04/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-46765		3
EN0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
EN0000982	Young Electric	18/04/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			107		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACM	Administration			095010155		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ACM	Administration			095010155		3
EN0000972	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
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	16/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000964	Red PC / IT Shop	20/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	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.

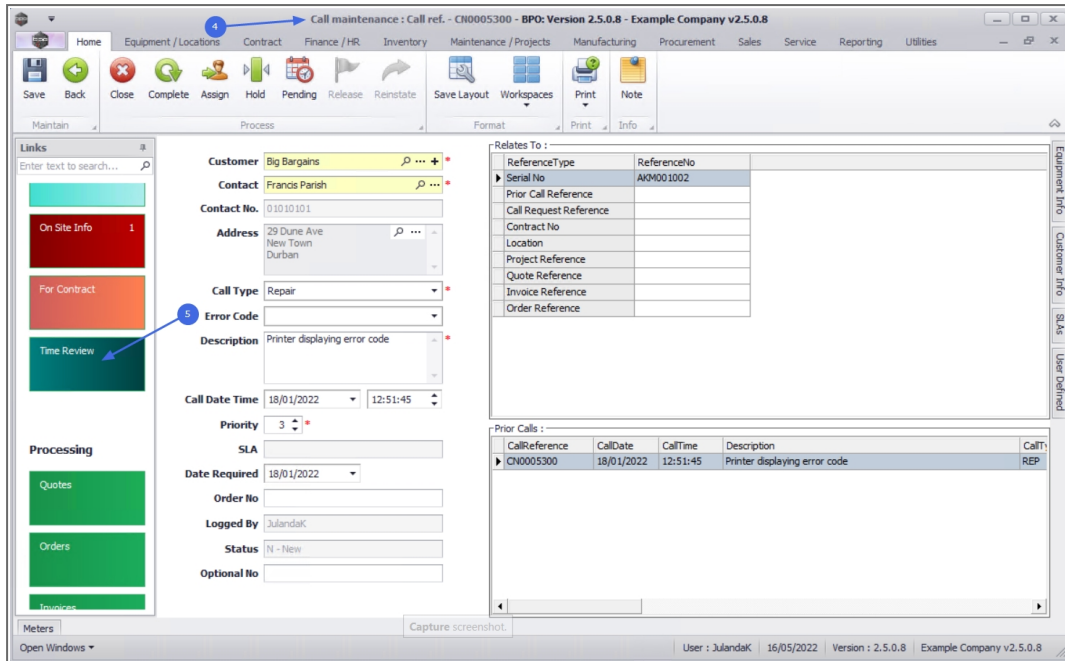
- Select the **Call** you wish to work with.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	12/12/2022	12:09:10	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	20/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000992	Top Vehicle Hire	25/10/2022	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP123456		3
BN CH000991	Apple Juice Inc	24/10/2022	05:36:15	Contact Closure - C0000051	DR	Select Call Type					3
BN CH000989	Derton / Technologies	13/04/2022	09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	02/06/2022	06:00:00	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	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/04/2022	06:00:00	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	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			AT000000		3
BN CH000983	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
BN CH000982	Young Electric	18/04/2022	06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000980	Hope Works (Pty) Ltd	18/11/2019	06:30:28	Test another call email	ADM	Administration			0950191015		3
BN CH000979	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			0950191015		3
BN CH000978	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000999	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000998	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000988	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000987	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000986	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000985	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000984	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000983	Westwood Dynamic	25/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000982	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000981	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000980	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000979	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000978	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000977	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000976	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000975	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Checkers Centre - Hilo-test	2
BN CH000974	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• Click on the **Edit** button.

• The **Call maintenance : Call ref. - [call number]** screen will be displayed.

• Click on the **Time Review** tile.



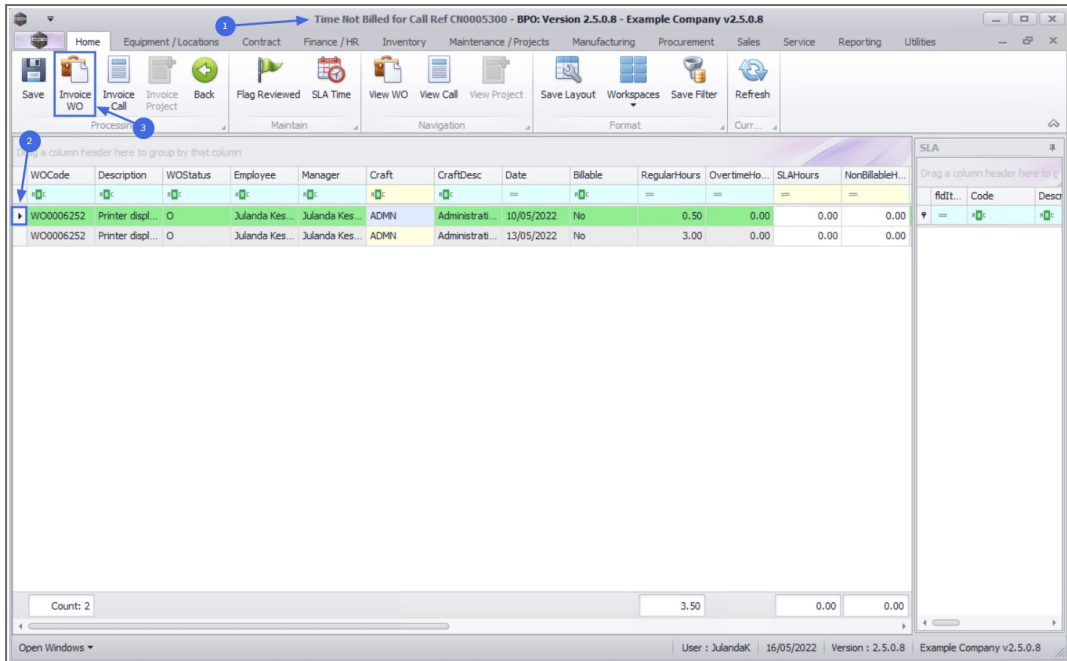
INVOICE WORK ORDER

A work order can be invoiced from the **Time Review** screen.

- From the **Time Note Billed for Call Ref** [call number] screen,
- Click on the **row** of the call you wish to invoice.
- Click on **Invoice WO**.



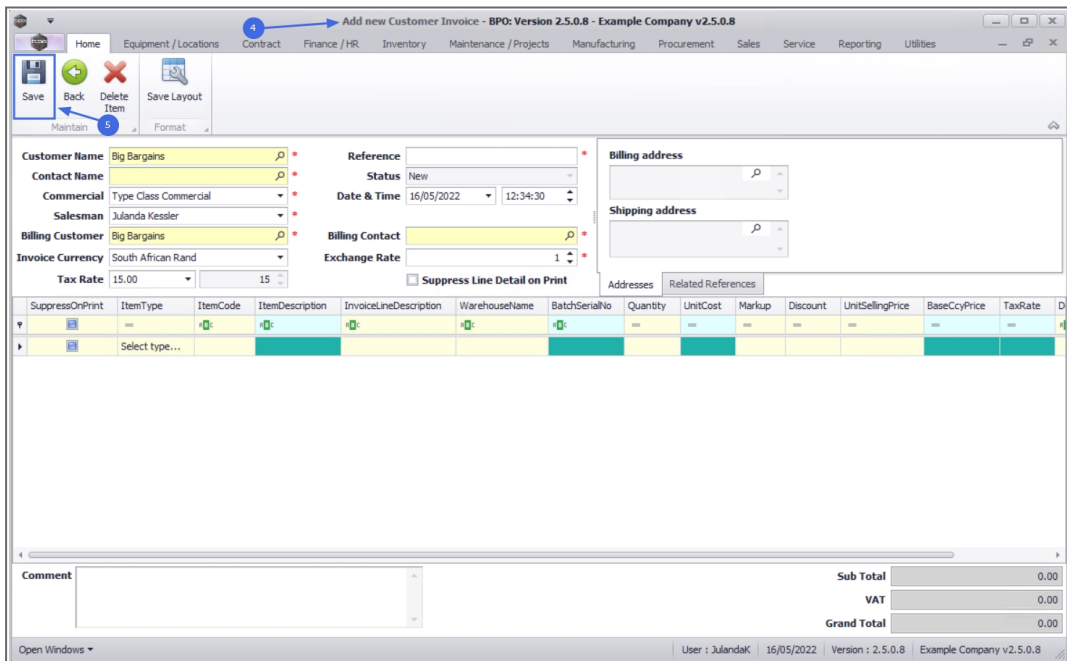
Short cut key: Right click to display the **All groups** menu list. Click on **Invoice WO**.



- The **Add New Customer Invoice** screen will be displayed.
- Complete the Customer Invoice then click on **Save**.

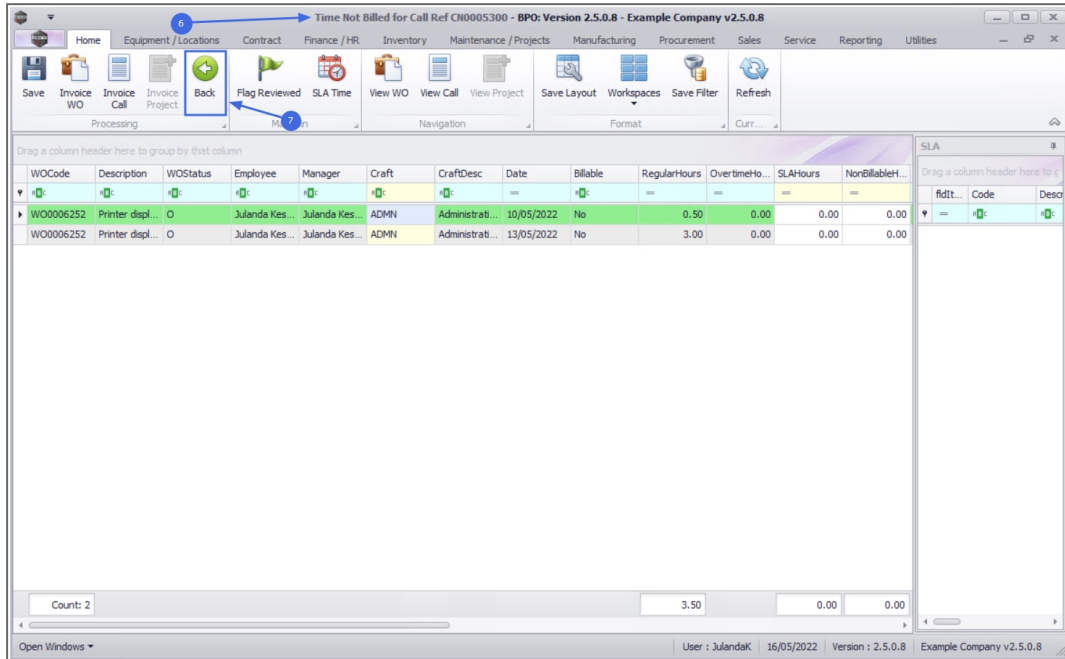


For a detailed handling of this topic refer to [Time Review - Invoice Work Order](#)



- You will return to the **Time Not Billed for Call Ref** screen.
- Click on **Back** to return to the **Call Listing** screen.

For a detailed handling of this topic refer to [Introduction to Invoices](#)

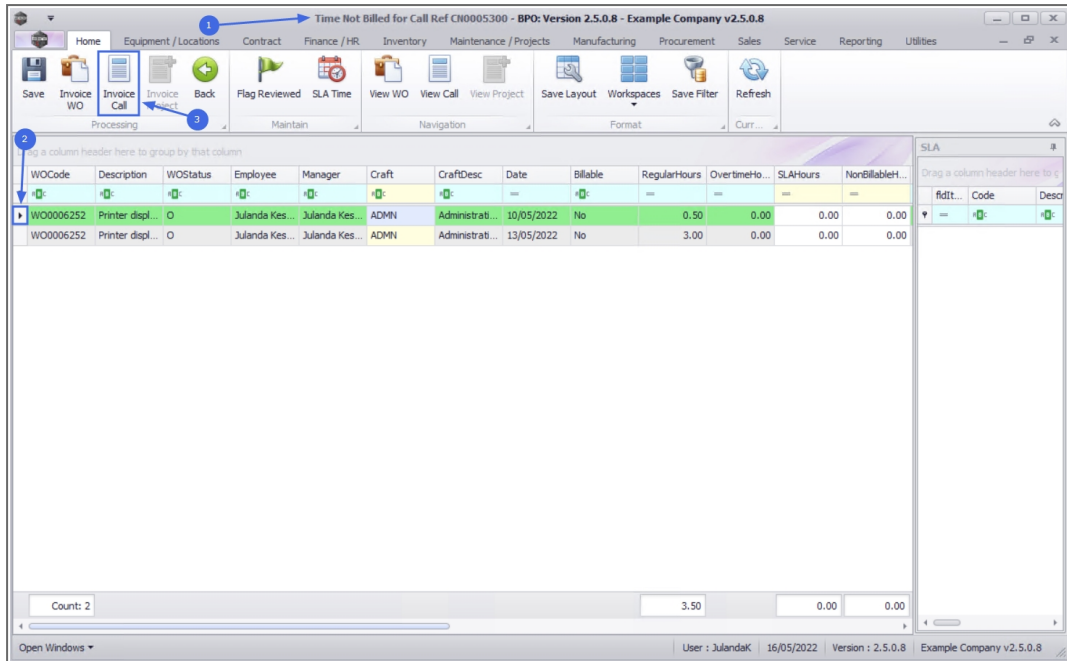


INVOICE CALL

- From the **Time Note Billed for Call Ref [call number]** screen,
- Click on the **row** of the call you wish to invoice.
- Click on **Invoice Call**.

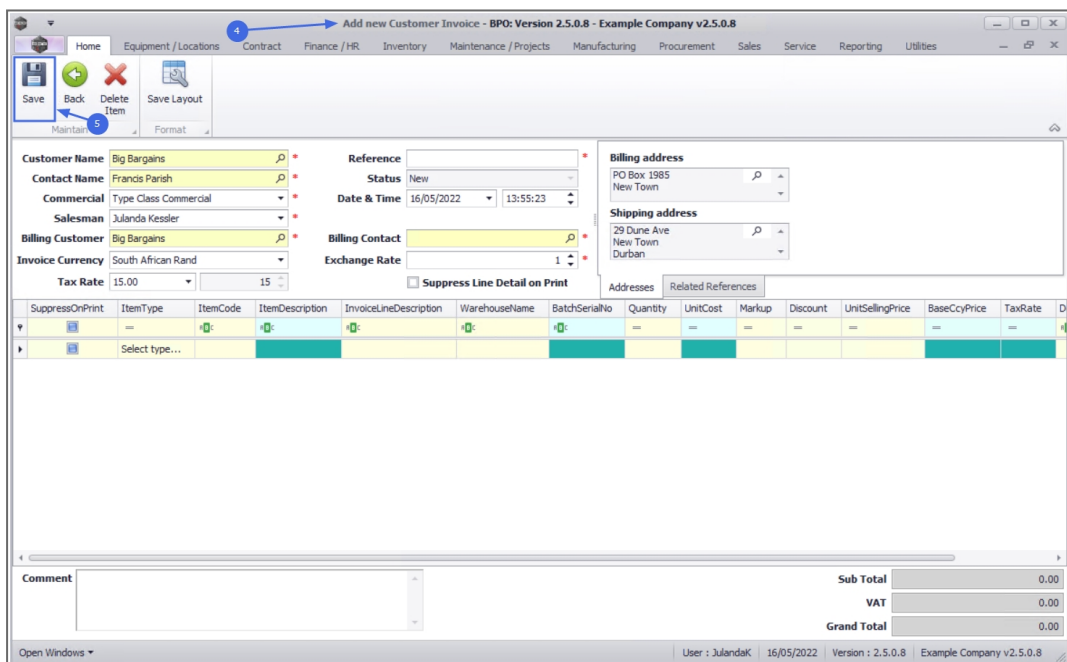


Short cut key: Right click to display the **All groups** menu list. Click on **Invoice Call**.



- The **Add New Customer Invoice** screen will be displayed.
- Complete the Customer Invoice then click on **Save**.

For a detailed handling of this topic refer to [Time Review - Invoice Call](#)



- You will return to the **Time Not Billed for Call Ref** screen.
- Click on **Back** to return to the Call Listing screen.



For a detailed handling of this topic refer to [Introduction to Invoices](#)

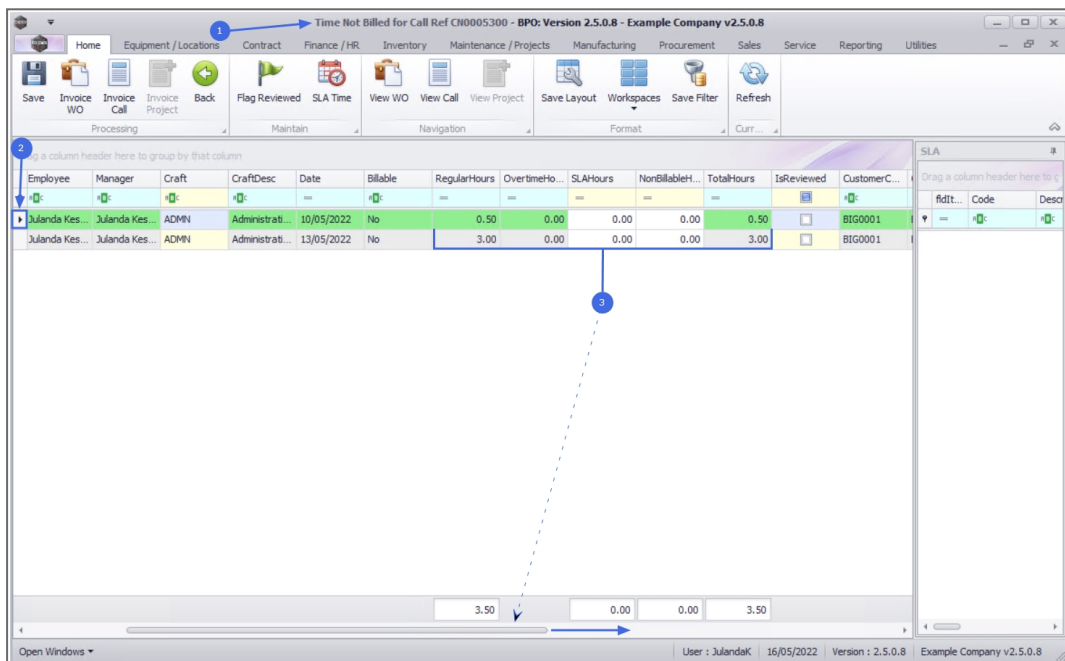
WOCODE	Description	WOSTATUS	Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHo...	SLAHours	NonBillableH...
W00006252	Printer displ...	O	Julanda Kes...	Julanda Kes...	ADMN	Administrat...	10/05/2022	No	0.50	0.00	0.00	0.00
W00006252	Printer displ...	O	Julanda Kes...	Julanda Kes...	ADMN	Administrat...	13/05/2022	No	3.00	0.00	0.00	0.00

FLAG REVIEWED

Note on the **Time Review flag**: Work orders created **after** the Time Review flag has been set to 'Yes' in the Configurator, will by default display as 'No' in the Billable column, yet all Regular Hours will be billed.

- From the **Time Not Billed for Call Ref** [call number] screen,
- Click on the **row** of the Call you wish to review the time for.
- **Scroll** until you can view all the Time columns.
 - **Billable:** Labour time is displayed as billable or non-billable.
 - **Regular Hours:** The time logged against the work order. (This field cannot be changed)

- **Overtime¹ Hours:** Overtime hours logged against the work order. (This field cannot be changed)
- **SLA Hours:²** Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
- **Non Billable Hours:³** Time allocated to this field will **not** be billed.
- **Total Hours:** = *Regular Hours + Overtime Hours + SLA Hours + Non Billable Hours*. (This field cannot be changed)



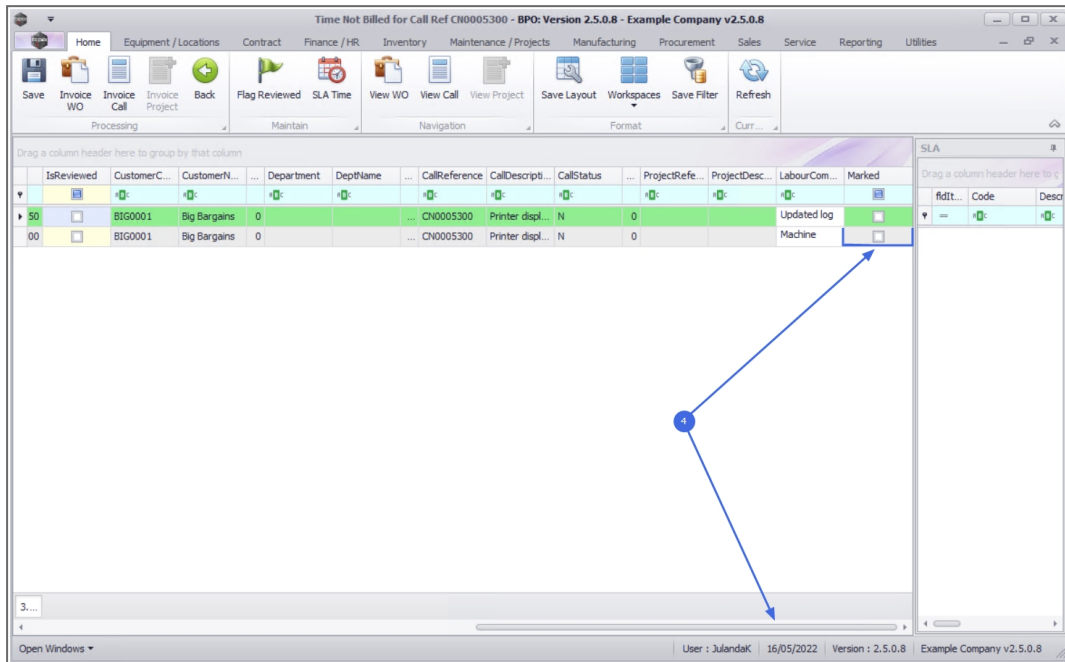
Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHours	SLAHours	NonBillableHours	TotalHours	IsReviewed	CustomerCode
Julanda Kes.	Julanda Kes.	ADMIN	Administrati...	10/05/2022	No	0.50	0.00	0.00	0.00	0.50		BIG0001
Julanda Kes.	Julanda Kes.	ADMIN	Administrati...	13/05/2022	No	3.00	0.00	0.00	0.00	3.00		BIG0001

¹Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.

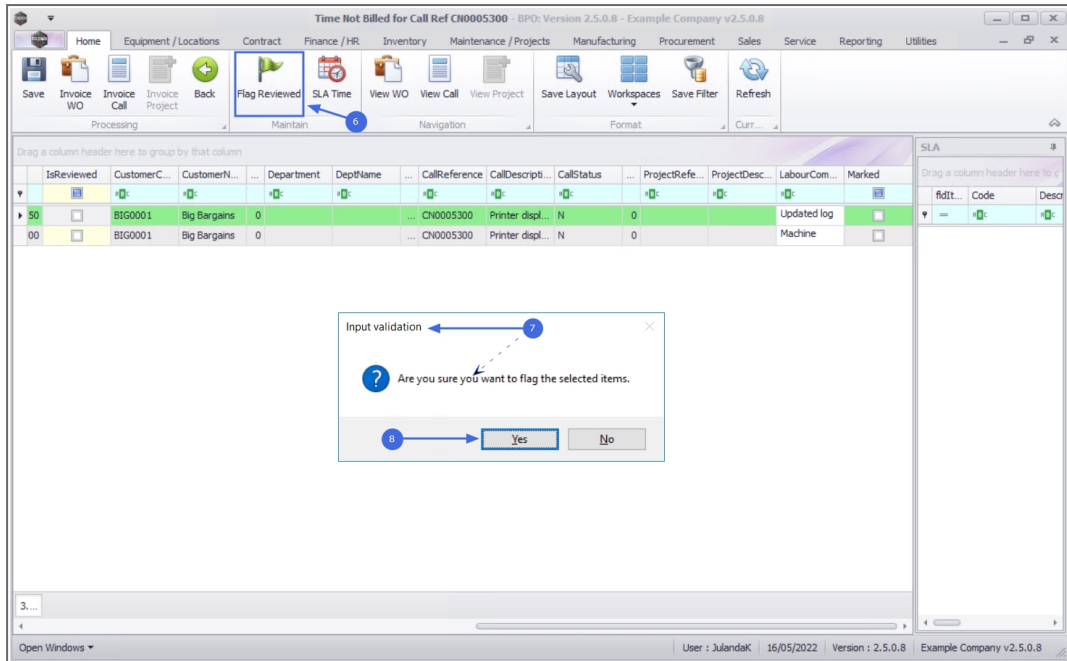
²Time allocated to SLA hours will be deducted from Regular Hours. For example 8 Regular Hours booked, will be updated to 7 Regular Hours when you add 1 to the SLA Hours field.

³Adding Non Billable hours will deduct from Regular hours

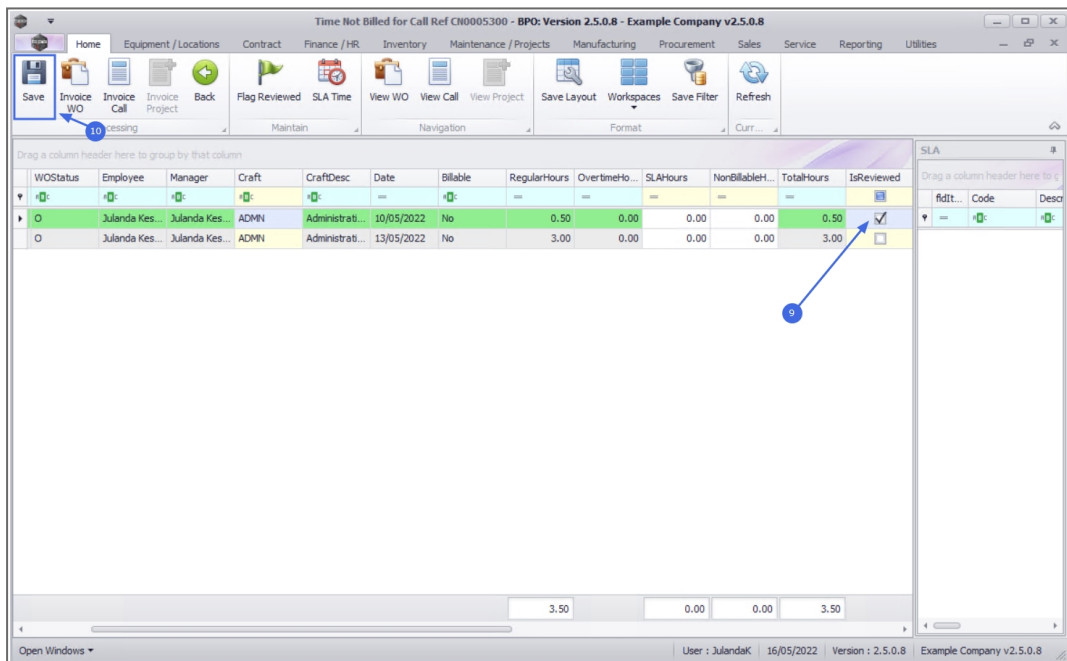
- **Scroll** right until you can view the **Marked** column.
- The Marked field for the work order will be checked when time is allocated to **SLA and/or Non Billable Hours**.



- Click on **Flag Reviewed**, when you have completed reviewing the time for the work order.
- When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to flag the following items.**
- Click on **Yes**.

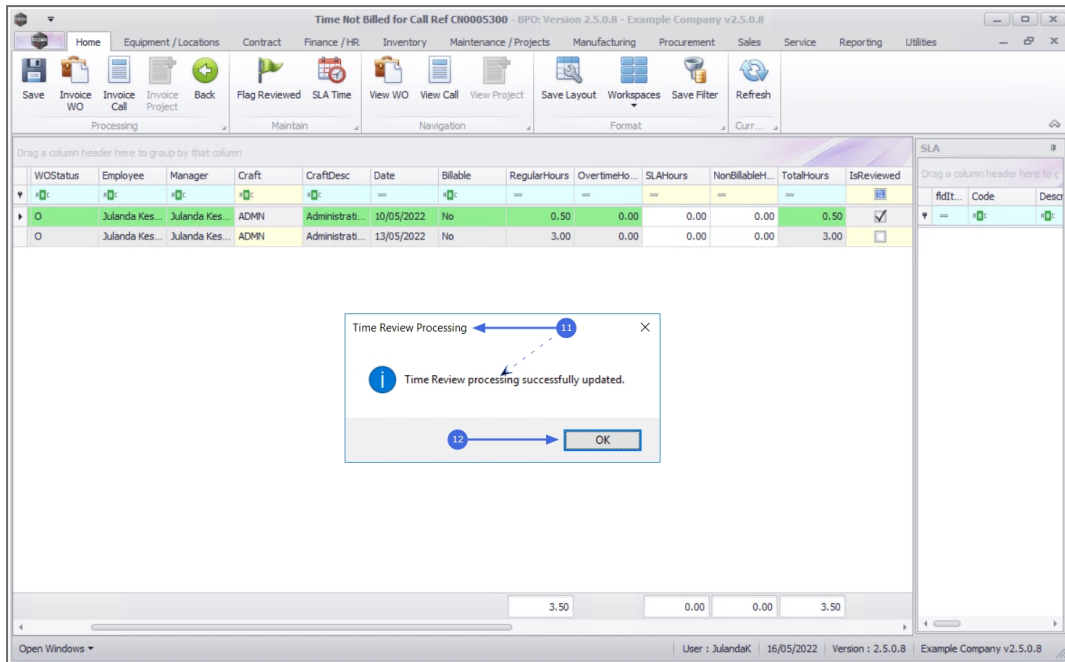


- The *Is Reviewed* field will now be checked.
- Click on *Save*.



- When you receive the *Time Review Processing* message to confirm;

- *Time Review processing successfully updated.*
- Click on **OK**.

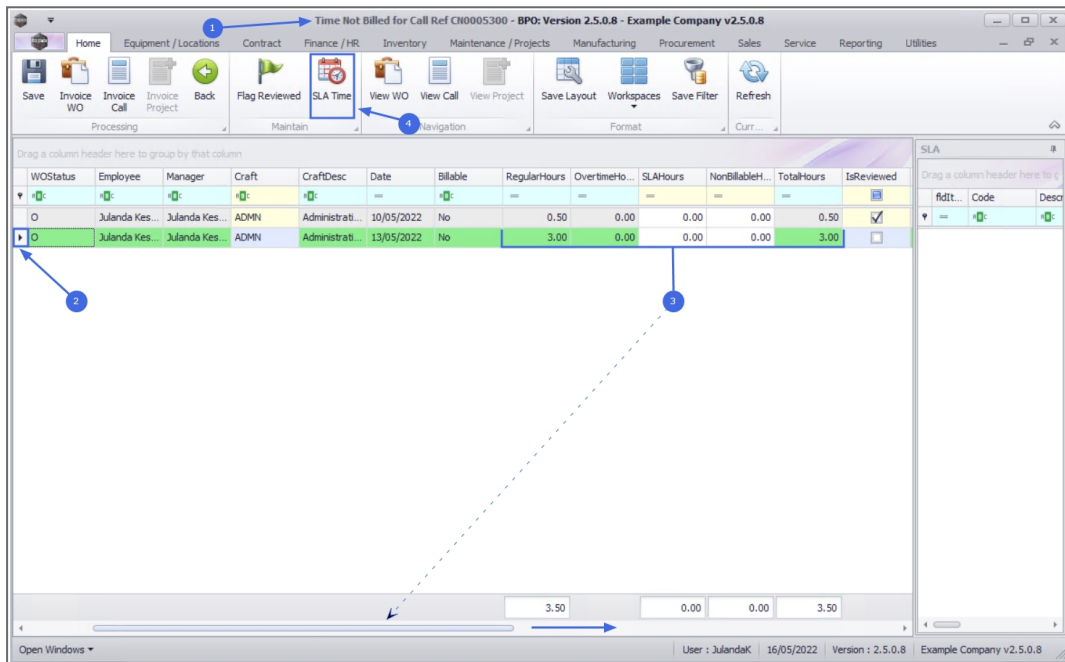


SLA TIME

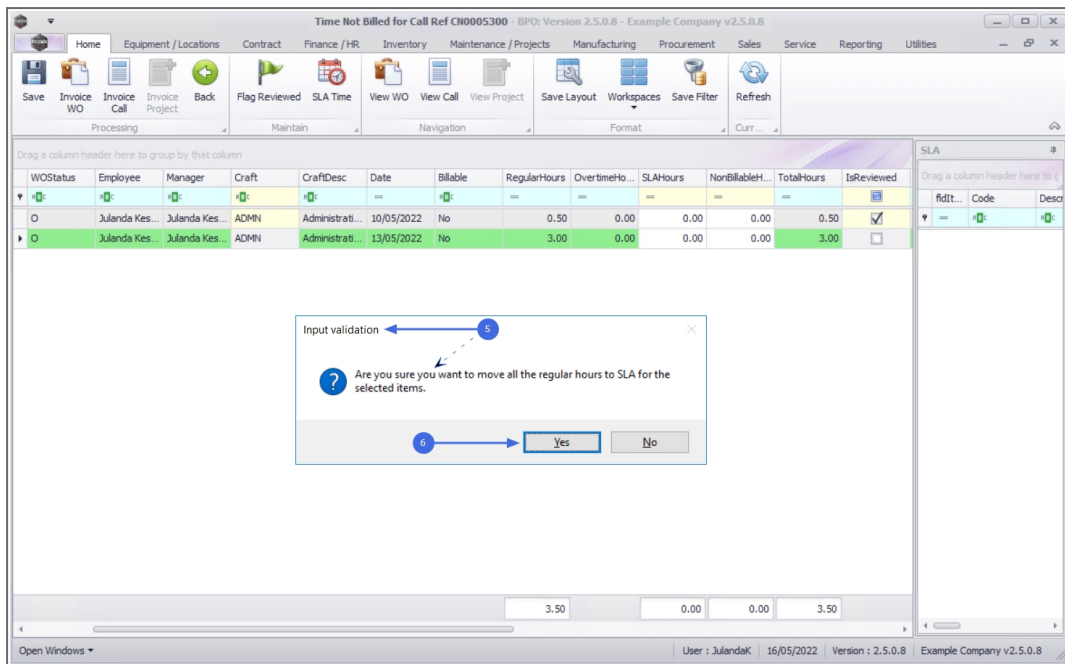
SLA¹ is the **Service Level Agreement** that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. Failing which, the client can receive compensation of a pre-agreed type (usually also set up in the SLA).

¹This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).

- From the **Time Not Billed for Call Ref** [call number] screen will be displayed.
- Click on the **row(s)** to select the work order(s) you would like to adjust Regular Hours booked, to SLA Time.
 - Any **contract inclusions** linked to an item on the selected work order will be displayed in the SLA section.
- Use the **scroll bar** to scroll until you are able to see the hours booked for the Work Order(s).
- Click on **SLA Time** to convert the Regular Hours to SLA Hours.



- When you receive the **Input validation** message to confirm;
 - **Are you sure you want to move all the regular hours to SLA for the selected items.**
- Click on **Yes**.

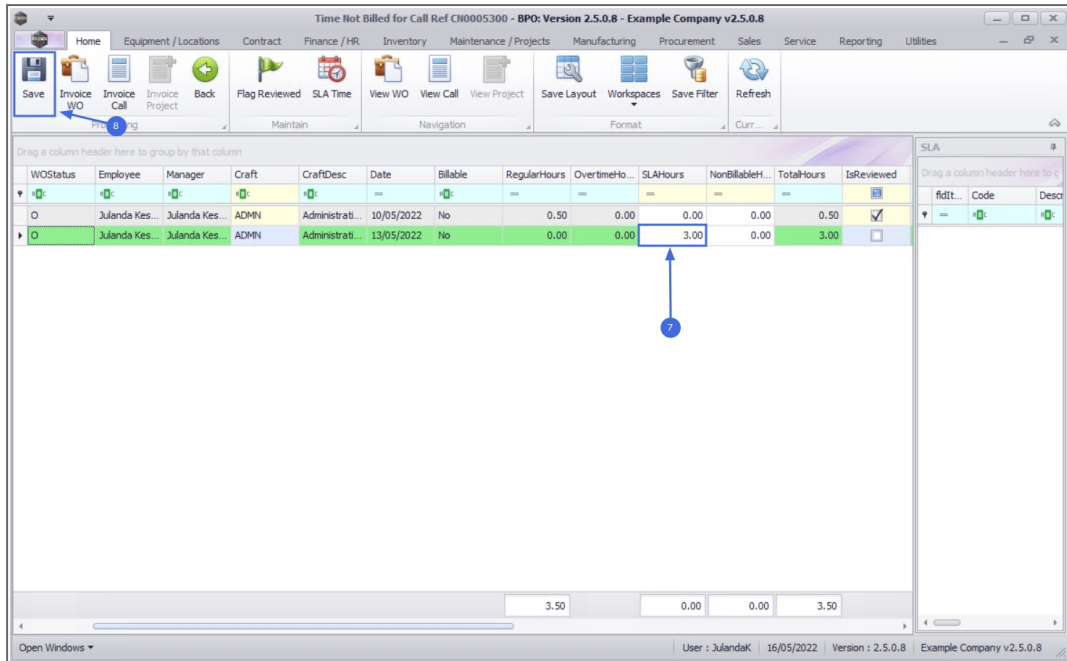


- The selected **work order(s)** have been updated and the Regular Hours have been moved or added to the SLA Hours.

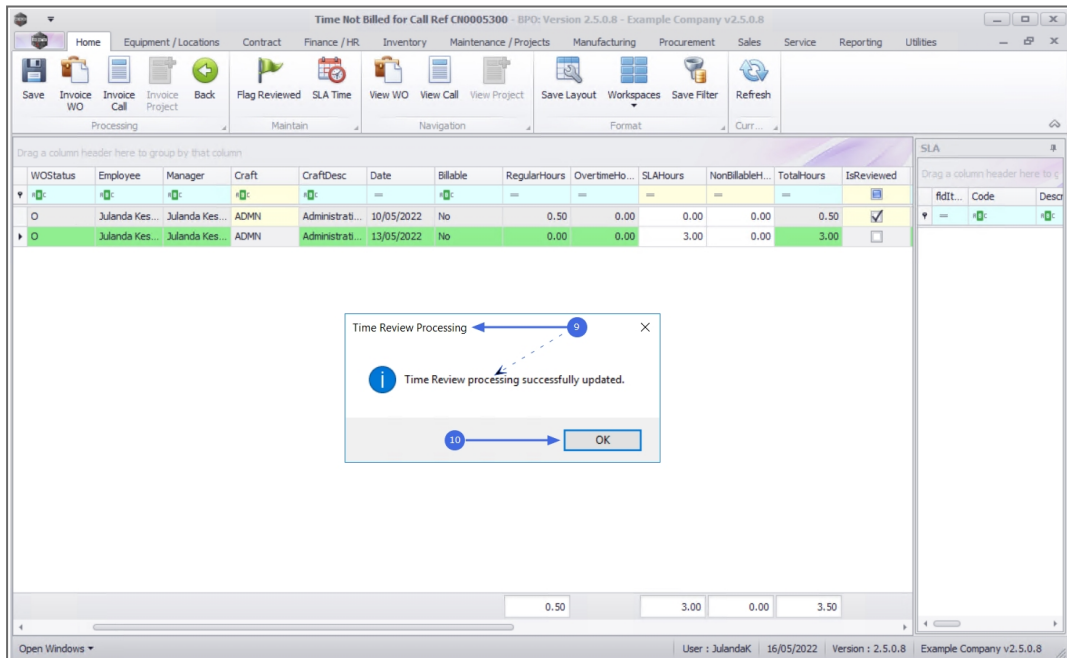


Note that only Regular Hours have been moved. Overtime and Non-Billable Hours were not affected.

- Click on **Save** to save the changes.

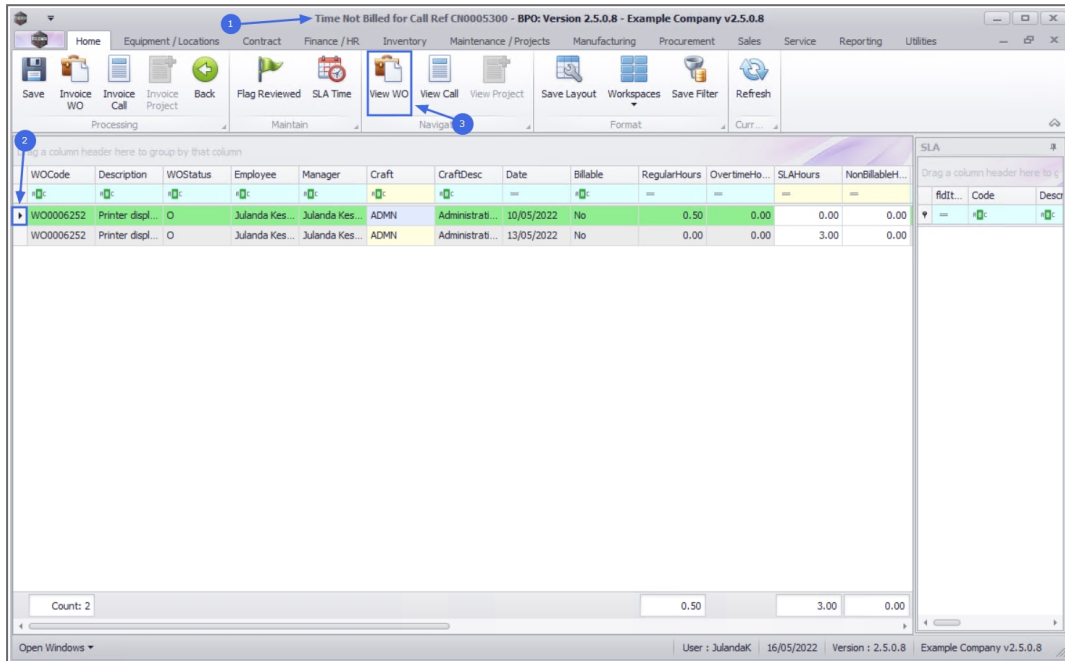


- When you receive the **Time Review Processing** message to confirm;
 - **Time Review processing successfully updated.**
- Click on **OK** to confirm.
- Click on **Back** to return to the Call Listing screen.

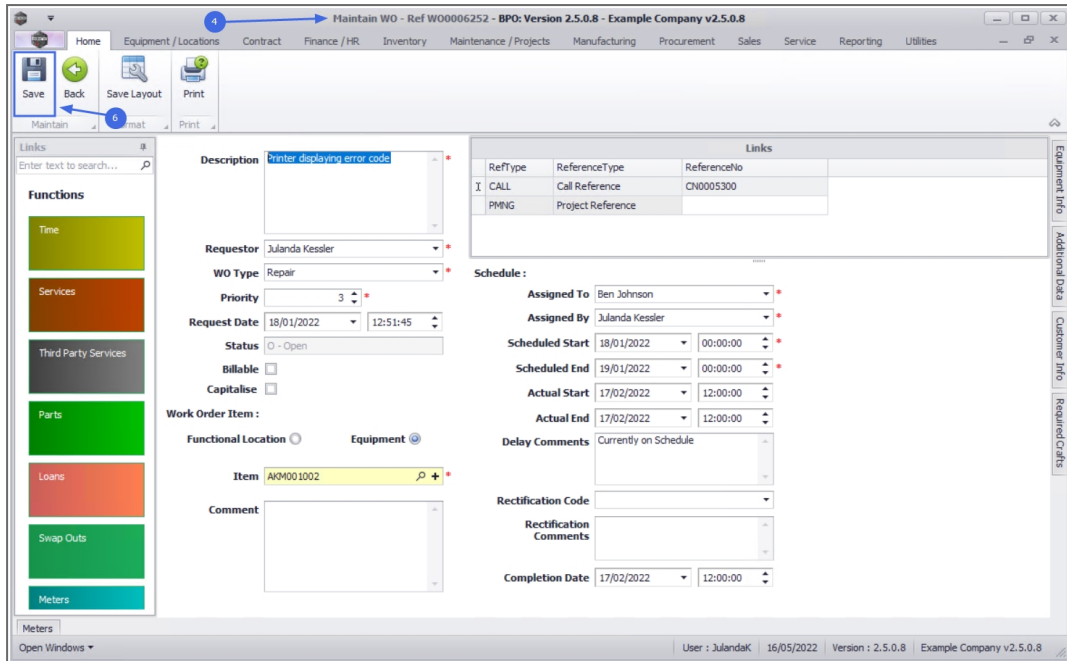


VIEW WORK ORDER

- From the **Time Not Billed for Call Ref** [call ref number] screen,
- Click on the **row** of the call you wish to view the work order of.
- Click on **View WO**.

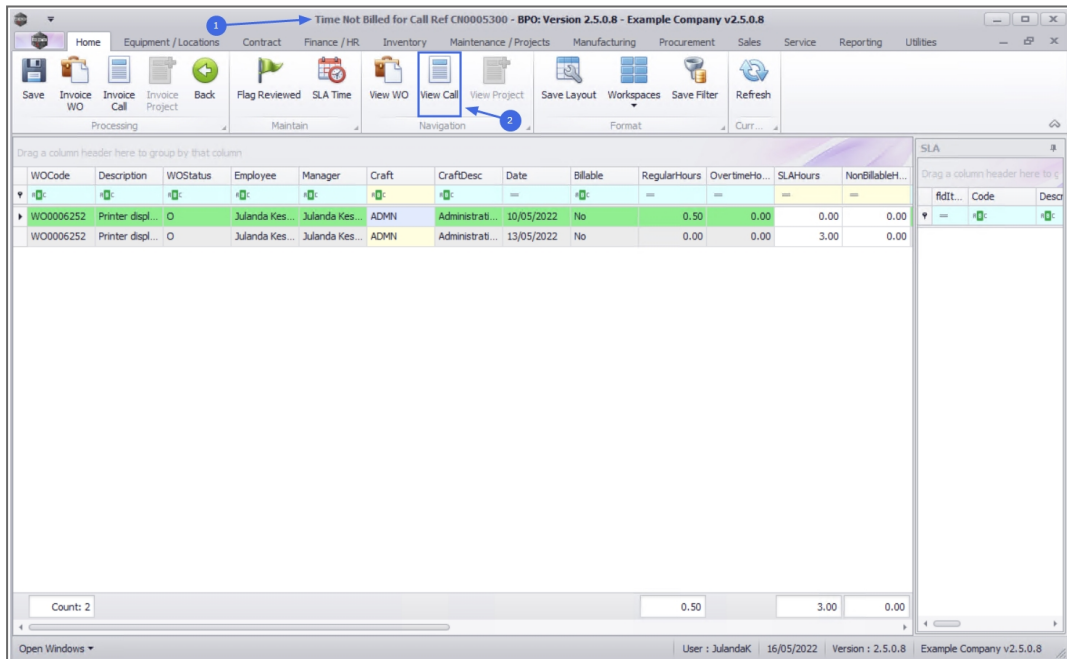


- " The Work Order Maintenance screen will be displayed. " on page 2
- From here you can add to or edit the **Work Order** details, **Customer Info**, the **Required Crafts**, **Additional Data** or the **Equipment Info** for the work order, or update the work order using the **Function** and **Processing** tiles.
- When you have completed making the changes to the maintenance screen, click on **Save**.

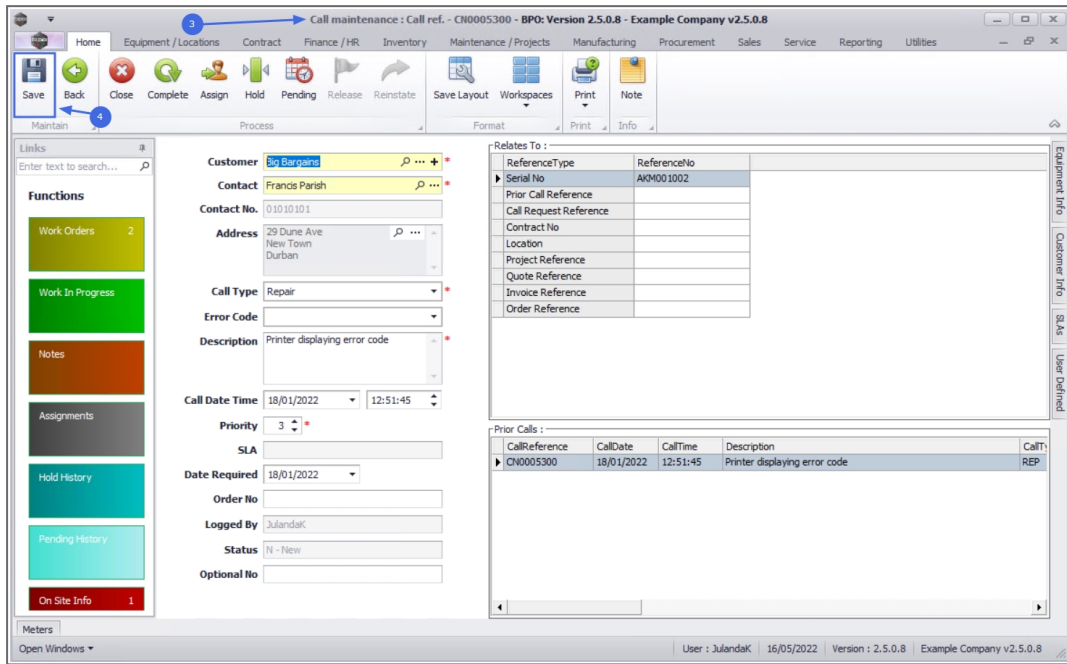


VIEW CALL

- From the **Time Not Billed for Call Ref [call number]** screen,
- Click on **View Call**.



- "The Call maintenance screen will be displayed." on page 4
- Make the required changes to the call information and click on **Save**



MNU.122.050