

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

SERVICE

CALL ADMINISTRATION - CALL WORK ORDERS

The Call Administration screen is part of the Extended Call Centre - Version Compatibility¹

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

A work order, or job card is an order for work to be performed for a **Company** or a **Customer**. <u>All</u> 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. <u>More than one</u> 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.



Ribbon Select Service > Call Administration



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

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runcuk	0115	► E CN0000040	-		-	Belinda Sha	13:26:10	-	SERV	Service			19
Work	Orders 1	E CN0000040	Westwood Dynamic Samanthas Diner	40 21/07/2014 42 21/07/2014		Beinda Sha	13:26:10	Service machine S/N: 1912-102036 Machine repair needed	REP	Repair			19
			Office Supplies Unlimited Titan Group	44 28/07/2014 47 31/07/2014	-	Belinda Sha George Jam		1 black toner for collection Service required	TON	Toner Required Service			19
Work In Progress		E CN0000047	Westwood Dynamic	51 05/08/2014		Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			1
work an Progress		E CN0000055	Titan Group	57 07/08/2014		Belinda Sha		Toner required	TON	Toner Required			2
		E CN0000056	Young Electric	58 07/08/2014		Beinda Sha		Contract Closure - CO0000021	DR	Select Call Type			2
		E CN0000057	Westwood Dynamic	59 08/08/2014		Belinda Sha		Deliver full set of toners	TON	Toner Required			1
Notes		E CN0000058	Samanthas Diner	60 08/08/2014		Wesley Har		New machine	NDS	New Deal Sale			1
		E CN0000058	Westwood Dynamic	62 08/08/2014	-	Wesley Har		Machine Rental Deal	NDR	New Deal Rental			
		E CN0000063	Young Electric	65 20/08/2014		Wesley Har		Machine service required	SERV	Service			SI
Assign	iments 2		Danny Storm IT Cafe	69 23/09/2014		Daniel Balgo.		Test BPO fin tran	NDS	New Deal Sale			
		E CN0000069	Danny Storm IT Cafe	71 23/09/2014		Daniel Balgo		Toner for delivery	TON	Toner Required			19
		E CN0000070	Derton / Technologies	72 23/09/2014	-	Daniel Balgo		Service machine	SERV	Service			19
	listory	E CN0000072	Derton / Technologies	74 25/09/2014		Karlien Jessi		Machine service required	SERV	Service			at
		E CN0000072	Derton / Technologies	75 25/09/2014		Karlien Jessi		test	NDS	New Deal Sale			a
		E CN0000075	Derton / Technologies	77 26/09/2014		Karlien Jessi		Service and toner required	SERV	Service			19
Dander	ng History	E CN0000084	Titan Group	86 11/11/2014		George Jam.		Magenta toner required	TON	Toner Required			19
	relarginsury	E CN0000085	Panda Copiers	87 11/11/2014		George Jam.		CO789	NDS	New Deal Sale			15
		E CN0000094	Westwood Dynamic	96 08/01/2015		George Jam		staple unit for rental on current contract	NDR	New Deal Rental			
		E CN0000099	Bothas Networking inc	13/01/2019		ocorge som.	16:40:32	test first work order	SERV	Service			
On Sit	e into	E CN0000109	Titan Group	26/02/2015		Carolina Su		Test machine	REP	Repair			19
		E CN0000125	Derton / Technologies	06/03/2015		Carolina Su		test	REP	Repair			1
		E CN0000127	Derton / Technologies	06/03/2015	-	Carolina Su	10:09:53	test	SERV	Service			1
		E CN0000135	Mary Contrary	27/05/2019		Carolina Su		New customer contact cal	DR	Select Call Type			
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		Count: 38	1										
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• Click on the row selector of the call you would like to work with.

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	E CN0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac	Relinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service				
	CN0000042 CN00000042	Samanthas Diner	42 21/07/2014		Belinda Sha		Machine repair needed	REP	Repair				
	E CN0000044	Office Supplies Unlimited	44 28/07/2014				1 black toner for collection	TON	Toner Required				
	► E CN0000047	Titan Group	47 31/07/2014		George Jam		Service required	SERV	Service				
Work In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required				
		Titan Group	57 07/08/2014	Awaiting Ac	Belinda Sha	12:14:38	Toner required	TON	Toner Required				
	E CN0000056	Young Electric	58 07/08/2014	Awaiting Ac	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type				
Notes	E CN0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required				
notes		Samanthas Diner	60 08/08/2014	Awaiting Ac	Wesley Har	11:52:16	New machine	NDS	New Deal Sale				
		Westwood Dynamic	62 08/08/2014	Awaiting Ac	. Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental				
	E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac	Wesley Har	12:26:58	Machine service required	SERV	Service				
Assignments 1	CN0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac	Daniel Balgo	. 11:23:30	Test BPO fin tran	NDS	New Deal Sale				
		Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac	Daniel Balgo	. 13:16:20	Toner for delivery	TON	Toner Required				
	E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac	Daniel Balgo	. 13:45:10	Service machine	SERV	Service				
Hold History	E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac	Karlien Jessi	. 11:04:32	Machine service required	SERV	Service				
		Derton / Technologies	75 25/09/2014	Awaiting Ac	Karlien Jessi	. 11:41:18	test	NDS	New Deal Sale				
	E CN0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac	Karlien Jessi	. 12:07:35	Service and toner required	SERV	Service				
		Titan Group	86 11/11/2014	Awaiting Ac	George Jam	. 16:17:59	Magenta toner required	TON	Toner Required				
		Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam.	16:21:59	CO789	NDS	New Deal Sale				
		Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental				
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service				
	E CN0000109	Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair				
	E CN0000125	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	09:37:02	test	REP	Repair				
For Contract	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service				
		Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type				
	Count: 38												
	Count: 30												

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WORK ORDERS

• Click on the **Work Orders** tile to view the list of work orders associated with the selected call.

) V					all Administra	tion - BPO: Ve	rsion 2.5.1.4 - v2514 Example Company					8)
Home Equip	nent / Locations Co	ntract Finance / HR 1	inventory Maint	enance / Project	ts Manufac	turing Proc	arement Sales Service Reporting Util	lities				8
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		Samanthas Diner	42 21/07/2014	Awaiting Ac	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			
Work Orders 1	E CN0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			
	E CN0000056	Young Electric	58 07/08/2014	Awaiting Ac	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
		pod Dynamic	59 08/08/2014	Awaiting Ac	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			1
Work On	ders	1 thas Diner	60 08/08/2014	Awaiting Ac	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
THORN OF	uci s	ood Dynamic	62 08/08/2014	Awaiting Ac	Wesley Har	13:12:15	Machine Rental Deal	NDR.	New Deal Rental			
		Electric	65 20/08/2014	Awaiting Ac	Wesley Har	12:26:58	Machine service required	SERV	Service			S
No		Storm IT Cafe	69 23/09/2014	Awaiting Ac	Daniel Balgo	11:23:30	Test BPO fin tran	NDS	New Deal Sale			
		Storm IT Cafe	71 23/09/2014	Awaiting Ac	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			1
	E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac	Daniel Balgo	13:45:10	Service machine	SERV	Service			1
Assignments 1	E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac	Karlien Jessi	11:04:32	Machine service required	SERV	Service			a
Assignments 1		Derton / Technologies	75 25/09/2014	Awaiting Ac	Karlien Jessi	11:41:18	test	NDS	New Deal Sale			
		Derton / Technologies	77 26/09/2014	Awaiting Ac	Karlien Jessi	12:07:35	Service and toner required	SERV	Service			1
		Titan Group	86 11/11/2014	Awaiting Ac	George Jam	16:17:59	Magenta toner required	TON	Toner Required			1
Hold History		Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam	16:21:59	CO789	NDS	New Deal Sale			
		Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam	15:07:45	staple unit for rental on current contract	NDR.	New Deal Rental			
	E CN0000099	Bothas Networking inc	13/01/2015	Awaiting Ac	Bianca Du T	16:40:32	test first work order	SERV	Service			
Pending History		Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair			1
		Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	09:37:02	test	REP	Repair			1
		Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service			1
On Site Info		Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
	E CN0000194	Hack PC - IT Shop	22/10/2015	Awaiting Ac	Karlien Jessi	13:56:55	Contract Closure - CO0000028	DR	Select Call Type			
	⊞ CN0000196	Green Tea Supplies	23/10/2015	Awaiting Ac	Belinda Sha	09:10:06	Contract Closure - CO0000030	DR	Select Call Type			
For Contract	CN0000198	Just In Time	29/10/2015			13:34:41	test	INST	Installation			
		Dolf Primary	29/10/2015	Awaiting Ac	Belinda Sha	14:26:35	2	NDS	New Deal Sale			
	Count: 37											

• The **Work Order** listing screen will open with work orders associated to the selected call.

â v				Wor	k Orders for Cal	ll Ref CN0000	042 - BPO: Ve	rsion 2.5.1.4 -	v2514 Example Co	mpany					- 8	x
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	▶ E WO0000185	Machine repair ne	eeded						CN0000042		21/07/2014	Machine repair needed		2 No		
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For a detailed handling of this topic refer to Introduction to Work

Orders

Related Topics

- Service Introduction to Call Administration
- Call Administration Edit a Call
- Call Administration My Calls
- Call Administration Assign a Call
- Call Administration Start or End Work
- Call Administration Close a Call
- Call Administration Complete a Call
- Call Administration Hold a Call
- Call Administration Pend a Call
- Call Administration Release a Call
- Call Administration Reinstate a Call

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