

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.

| | Home Equi | pment / Locations Co | intract Finance / HR | Inventory Mai | ntenance / Project | h Magufac | turing Drov | urement Sales Service Reporting Utilities | | | | | 8 2 |
|------------------|---------------|----------------------|--|--------------------------------|--------------------|---------------------------|-------------|---|----------|---------------------------|-----------|---------------|-----|
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| inks | | Dran a column heads | | | | | | | | | | | |
| iter text | to search | CalReference | CustomerName | CalDate | CallState | Technician | CalTime | Description | CallType | CalTypeDesc | ErrorCode | ErrorCodeDesc | Se |
| Functio | | * IC | AD: | Calbate | | ill: | (D) | | ill: | (D: | +D: | AD: | - |
| 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 | | | |
| | | | | | rendering Ac. | | | | are a | and an ite | | | |
| | | Count: 38 | 1 | | | | | | | | | | |
| _ | | + | | | | | | | | | | | |

• Click on the row selector of the call you would like to work with.

| w. | | | | C | all Administra | tion - BPO: Ve | | | | | | 2 | |
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| Home Equip | ment / Locations Co | intract Finance / HR | Inventory Maint | enance / Projec | ts Manufac | turing Prov | urement Sales Service Reporting Ut | lities | | | | 8 | |
| | Refresh My Call | s 🔲 🔣 Save Layout iiii Workspaces 🕶 🖓 Save Filter | Assign Call | Iose Complet | e Hold Pe | nding Releas | Reinstate Print Reports | | | | | | |
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| nks a | | | | | | | | | | | | | |
| ter text to search P | CalReference | CustomerName | CalDate | CallState | Technician | CallTime | Description | CallType | CallTypeDesc | ErrorCode | ErrorCodeDesc | | |
| unctions | Y (D: | 10: | | ×0: | 10: | (D) | AD C | 10: | 0 | ×D: | -0: | | |
| | 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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| ter text to search 🔎 | CalReference | CustomerName | CalDate | CallState | Technician | CallTime | Description | CallType | CallTypeDesc | ErrorCode | ErrorCodeDesc | S |
| unctions | ▼ 10: | 10: | - | ×0: | ·0: | <u>ا</u> ت: | 10 | 10: | (D): | (D) | 10: | 4 |
| | | 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 |
|--|---------------------|-------------------|-------------------------------------|---------------|------------------|--------------------|---------------|-----------------|-----------------------|------------|-------------|-----------------------|----------|-------------------------|--------------------------|---|
| Home Equipment | nt / Locations Cont | tract Finance / | HR Inventory | Maintenance / | Projects Man | ufacturing | Procurement | Sales Se | ervice Reporting | Utilities | | | | | _ 8 | × |
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| inter text to search P | WOCode | Description | | | | | | | CalReference | Capitalise | RequestDate | CalDesc | Priority | Invoiceable | ProjectRef | F |
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| | ▶ E WO0000185 | Machine repair ne | eeded | | | | | | CN0000042 | | 21/07/2014 | Machine repair needed | | 2 No | | |
| The Party Services Parts Come Seep Cute Returns Return | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |



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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