

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

## SERVICE

# CALL ADMINISTRATION – CALL SALES ORDERS

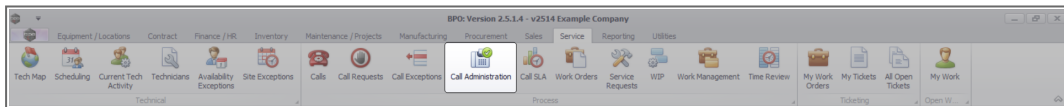
The Call Administration screen is part of the Extended Call Centre - Version Compatibility<sup>1</sup>

The **Orders** tile is a quick way to navigate to the list of Orders related to the selected call.

## THE CALL ADMINISTRATION LISTING SCREEN

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Ribbon Select **Service** > **Call Administration**



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

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<sup>1</sup>BPO2 v2.5.1.3 or higher.

Call Administration - BPO: Version 2.5.1.4 - v2514 Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service			19
CH000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			19
CH000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			19
CH000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan	14:13:49	Service required	SERV	Service			19
CH000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			14
CH000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha	12:14:38	Toner required	TON	Toner Required			20
CH000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
CH000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har	12:26:58	Machine service required	SERV	Service			53
CH000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo	11:23:30	Test BPO fit tran	NDS	New Deal Sale			
CH000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			19
CH000070	Derbon / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service			
CH000072	Derbon / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi	11:04:32	Machine service required	SERV	Service			ab
CH000073	Derbon / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi	11:41:18	test	NDS	New Deal Sale			
CH000075	Derbon / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi	12:07:35	Service and toner required	SERV	Service			19
CH000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan	16:17:59	Magenta toner required	TON	Toner Required			19
CH000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan	16:21:59	CO789	NDS	New Deal Sale			
CH000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jan	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH000099	Bobas Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su	09:52:00	test machine	REP	Repair			19
CH000125	Derbon / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	09:37:02	test	REP	Repair			19
CH000127	Derbon / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	10:09:53	test	SERV	Service			19
CH000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			

Count: 381

User : Bianca | 09/01/2024 | Version : 2.5.1.4 | v2514 Example Company

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

Call Administration - BPO: Version 2.5.1.4 - v2514 Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service			19
CH000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			19
CH000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			19
CH000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan	14:13:49	Service required	SERV	Service			19
CH000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			14
CH000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha	12:14:38	Toner required	TON	Toner Required			20
CH000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
CH000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har	12:26:58	Machine service required	SERV	Service			53
CH000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo	11:23:30	Test BPO fit tran	NDS	New Deal Sale			
CH000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			19
CH000070	Derbon / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service			
CH000072	Derbon / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi	11:04:32	Machine service required	SERV	Service			ab
CH000073	Derbon / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi	11:41:18	test	NDS	New Deal Sale			
CH000075	Derbon / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi	12:07:35	Service and toner required	SERV	Service			19
CH000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan	16:17:59	Magenta toner required	TON	Toner Required			19
CH000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan	16:21:59	CO789	NDS	New Deal Sale			
CH000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jan	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH000099	Bobas Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su	09:52:00	test machine	REP	Repair			19
CH000125	Derbon / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	09:37:02	test	REP	Repair			19
CH000127	Derbon / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	10:09:53	test	SERV	Service			19
CH000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			

Count: 381

User : Bianca | 09/01/2024 | Version : 2.5.1.4 | v2514 Example Company

## ORDERS

- Click on the **Orders** tile.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0001036	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Belinda Sha.	10:40:51	Copier service required.	SERV	Service			20
CH0001035	Hope Works (Pty) Ltd	12/12/2023	Unassigned		10:38:38	Paper keeps jamming.	REP	Repair			20
CH0001034	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Bianca Du T.	10:29:04	Full set of toners required.	TON	Toner Required			AT
CH0001033	Young Electric	05/12/2023	Unassigned		15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale			
CH0001032	Young Electric	02/10/2023	Unassigned		13:35:12	Test credit note on work order	MAN	Manufacturing			
CH0001031	Hope Works (Pty) Ltd	29/09/2023	Unassigned		12:56:41	New Deal created from order OR0000305	NDS	New Deal Sale			
CH0001024	Hope Works (Pty) Ltd	12/09/2023	Unassigned		09:23:30	Contract for Expiry Test	NDR	New Deal Rental			
CH0001023	Derton / Technologies	08/09/2023	Unassigned		10:52:25	Open warranty claims have not been processed.	INSP	Inspection			20
CH0001022	Derton / Technologies	08/09/2023	Unassigned		10:44:45	Meters attached with no readings captured	INST	Installation			20
CH0001017	Derton / Technologies	07/09/2023	Unassigned		15:43:14	Call Exceptions - to correct but not flag.	INCT	Installation			20
CH0001015	Hope Works (Pty) Ltd	05/09/2023	Awaiting Ac.	Bianca Du T.	15:56:53	Test call site functionality	SERV	Service			20
CH0001014	Apple Juice Inc	22/08/2023	Unassigned		11:30:52	Contract Closure - CD0000086	TR	Training			
	Copiers	22/08/2023	Unassigned		11:28:32	Contract Closure - CD0000041	DR	Select Call Type			
	Electric	22/08/2023	Unassigned		11:28:26	Contract Closure - CD0000031	DR	Select Call Type			
	ig Shoes	22/08/2023	Unassigned		11:28:18	Contract Closure - CD0000001	DR	Select Call Type			
	Electric	22/08/2023	Unassigned		11:27:49	Contract Closure - CD0000008	DR	Select Call Type			
	Supplies Unlimited	22/08/2023	Unassigned		11:27:30	Contract Closure - CD0000006	DR	Select Call Type			
	Juice Inc	25/07/2023	Unassigned		10:18:33	Machine inspection required	INSP	Inspection			
CH0001006	Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac.	Bianca Du T.	11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	50
CH0001005	Hope Works (Pty) Ltd	07/06/2023	Unassigned		10:14:52	Wills require reworking	SM	Scheduled Maintenance	SERV	Services	10
CH0001003	Young Electric	12/12/2022	Awaiting Ac.	Ann Milton	10:09:10	Test account balances	DR	Select Call Type			10
CH0001002	Samanthas Diner	12/12/2022	Awaiting Ac.	Mary Thom.	16:18:30	Test call for account balances manual.	DR	Select Call Type			19
CH0001001	Young Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	PR	Parts Requirement			10
CH0000996	Hope Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
CH0000991	Apple Juice Inc	24/10/2022	Unassigned		16:38:15	Contract Closure - CD0000054	ADM	Administration			

- The **Orders** listing screen will open displaying the Orders related to the selected call.

OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	SalesmanName	Comments	Status
OR0000308	DER001	Derton / Technologies	Quote Extra Parts Req.	1,120.56	ZAR	1.00	15.00	07/12/2023	Bianca Du Toit		A

For a detailed handling of this topic refer to Calls - Sales Order

## 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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