

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

SERVICE

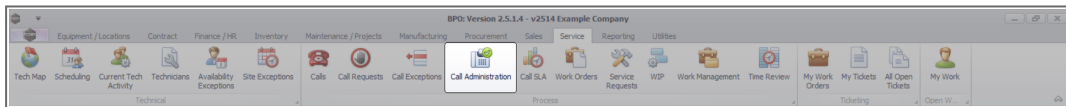
CALL ADMINISTRATION – CALL SALES CREDIT NOTES

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

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

THE CALL ADMINISTRATION LISTING SCREEN

Ribbon Select **Service > Call Administration**



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

¹BPO2 v2.5.1.3 or higher.

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			

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

CREDIT NOTES

- Click on the **Credit Notes** 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	BN	Manufacturing			
CH0001031	Hope Works (Pty) Ltd	29/09/2023	Unassigned		12:56:41	New Deal created from order CR0000305	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 for functionality	SERV	Service			20
CH0001014	Apple Juice Inc	22/08/2023	Unassigned		11:30:52	Contract Closure - CD0000086	TR	Training			
CH0001012	Panda Copiers	22/08/2023	Unassigned		11:28:32	Contract Closure - CD0000041	DR	Select Call Type			
CH0001011	Young Electric	22/08/2023	Unassigned		11:28:26	Contract Closure - CD0000031	DR	Select Call Type			
CH0001010	Dancing Shoes	22/08/2023	Unassigned		11:28:18	Contract Closure - CD0000001	DR	Select Call Type			
CH0001009	Young Electric	22/08/2023	Unassigned		11:27:49	Contract Closure - CD0000008	DR	Select Call Type			
CH0001008	Office Supplies Unlimited	22/08/2023	Unassigned		11:27:30	Contract Closure - CD0000006	DR	Select Call Type			
CH0001007	Apple Juice Inc	25/07/2023	Unassigned		10:18:03	Machine inspection required	INSP	Inspection			
CH0001006	Works (Pty) Ltd	07/06/2023	Awaiting Ac.	Bianca Du T.	11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	53
CH0001005	Works (Pty) Ltd	07/06/2023	Unassigned		10:14:52	Mills require reworking	SM	Scheduled Maintenance	SERV	Services	
CH0001004	Electric	12/12/2022	Awaiting Ac.	Ann Milton	10:09:10	Test account balances	DR	Select Call Type			10
CH0001003	ihes Diner	12/12/2022	Awaiting Ac.	Mary Thom.	16:18:30	Test call for account balances manual.	DR	Select Call Type			19
CH0001002	Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	PR	Parts Requirement			
CH0001001	Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
CH0001000	Juice Inc	24/10/2022	Unassigned		16:38:15	Contract Closure - CD0000054	ADM	Administration			

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

CNoteNo	CustomerCode	CustomerName	CNoteStatusDesc	CNoteDescription	Currency	ExchangeRate	TaxRate	CNoteDate	CNoteTime	SalesmanEmpNo	Salesman
CH0000139	DEK001	Derton / Technologies	New	123456	ZAR	1.00	15.00	05/09/2023	14:14:32	DUT001	Bianca Du

[For a detailed handling of this topic refer to Calls - Add a Credit Note](#)

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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