

(missing or bad snippet)

SERVICE

CALLS - THE EDIT BUTTONS

When a call is saved, BPO automatically generates a Work Order for the call that holds all the information logged against the call.

If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can update the details <u>directly</u> in the call screen, by clicking on the **Edit [...] (ellipsis)** buttons in the relevant fields.

Ribbon Access: Service > Calls



- 1. The **Call Listing** screen will be displayed.
- 2. Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
- 3. The **Work Order data grid** will be **expanded** to display the generated **work order number** and all the information for the call log.
- 4. Click in the **row** of the Work Order you wish to edit.
- 5. Click on Edit.



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	Closed	0			0005289	08/10/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom B	Bin Maintena	SM	Sched	duled
		0			0005288	01/10/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom B	Bin Maintena	SM	Sched	duled
- 0	Cape Town	0			0005287	24/09/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom B	Bin Maintena	SM	Sched	duled
	🕗 New	0			0005286	17/09/2021	UnAssigned			08:00:00	BathBinMaint - Bathroom B	Bin Maintena	SM	Sched	duled
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6. The **Call maintenance** screen will be displayed.

EDIT CUSTOMER INFO

7. Click on the Edit [...] (ellipsis) button in the Customer field.



Home E	6	tions (Contract			: Call ref Inventory		- BPO: Vers						Reporting	Utilities		•
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unctions		Contact	No. 03	31 123 4567	7				quest Refer				_				
Work Orders				ot 91 Leaf R		p		Contra			CO0000050		-				
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Work In Progress		Call T	ype Re	epair			* *	Invoice	Reference				_				
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Assignments	G	all Date T		4/12/2021	•	10:23:41	\$										
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On Site Info	1	prolit						•									
eters																	
en Windows 🔻										User	: JulandaK	15/12/20	21 Vers	ion : 2.5.0.4	Example Con	mpany v2.	5.0.

- 8. The **Customer Maintenance** screen will be displayed.
- Edit the details for the customer and click on Save to return to the Call maintenance screen.

\$ ₹	8	Customer Maintenance	- BPO	0: Version 2.5.0.4 - I	xample Company v2.5.0.0)				_ 0	x
Home Equipment	nt / Locations Contract	Finance / HR Inventory Ma	ainter	nance / Projects Ma	nufacturing Procurement	Sales	Service	Reporting	Utilities	_ 8	ж
Save Back		Make the necessary of the customer in		es to							\$
Links 4	Detail Commercial										S
Enter text to search P	Туре	Retail	•	Primary Contact	Mandy Jefferson	-	•				User Defined
Functions	Customer Code	HOP001	*	Email Address	snenhlanhlandwalane@gmail.	com					ned
	Customer Name	Hope Works (Pty) Ltd	•	Invoice Method	Print and Email	*					
Notes	Credit Limit	5000	;		Primary is Accounts Co	ontact					
	Web Site	www.hopeworks.co.za		Accounts Contact	Mandy Jefferson						
	Phone No.	031 123 4567		Email Address	snenhlanhlandwalane@gmail.	com					
Contacts	Tax Rate	15.00	•	Billing Address	PO Box 7452		•				
	VAT No.	987654321	+		Forest Hills						
	Registered Name	Hope Works (Pty) Lts			New Town						
Addresses	Registration No.	123456789			Durban South						
	Holding Company	No Holding Co	C		South Africa						
	Currency	South African Rand	•	Bill Postal Code							
Documents	Account Code		C	Physical Address	Copy Billing to Shipping)					
	Credit Check	No Check	•	Physical Address	Leaf Hills						
	Credit Terms	30 Days	•		Pink Town						
Call History	Reporting Area	Durban	•		Durban South						
	Salesman	Bianca Du Toit	*		South Africa						
	Account Manager	Bianca Du Toit	•	Postal Code	1234						
Project History	Is Debtor	Is Consolidated	1	Trading As Name	Hope Works						
	Send SMS	Send Email	1	Shift Pattern	Normal Week	•	•				
				Rank	Gold	•					
History											
Authorisation Information											
Open Windows 🕶					User : JulandaK	15/12/20	021 Versio	on : 2.5.0.4	Example Cor	mpany v2.5.0.	0 /
											- 11.

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ADD NEW CONTACT

When you are initially selecting the contact for the call log in the Call Maintenance screen, it may be that your contact is <u>not</u> listed. You can **add** a new contact <u>directly</u> from the Call maintenance screen.

Note that this contact should be set up as a Standard Contact. For additional help with this process, refer to Calls - Add New Contact.

1. Click on the **Edit [...] (ellipsis)** button in the **Contact** field.

▶ ▼	Call maintenance : Call ref C	N0005298 - I	BPO: Version 2.5.0.4 - E	xample Comp	any v2.5.0.0		
Home Equipment / Locations Contra	ct Finance / HR. Inventory	Maintenance /	Projects Manufacturin	ng Procureme	ent Sales	Service Reporting	Utilities — 🗗
Save Back Close Complete Assign Hold	Pending Reléase Reinstate	Save Layout	Workspaces Print	Note			
Maintain a Proce	255 4	For		₄ Info ₄			
inks 4			Relates To :				
nter text to search P Customer	Hope Works (Pty) Ltd 🖉 …	• + *	ReferenceType	Referer			
Contact	Kelly Jones 🔎	• ••• •	 Serial No Prior Call Reference 	1020-10	0101		
Functions Contact No.	021 122 4567		Call Reguest Reference				
			Contract No	ce CO0000	1050		
Work Orders 1 Address	Plot 91 Leaf Road , 0	A 1	Location	00000		-	
	Pink Town		Project Reference				
	Durban South	Ŧ	Quote Reference			-	
Work In Progress Call Type	Repair	•	Invoice Reference			_	
Error Code	Paper lam	•	Order Reference				
Notes	Paper not feeding through rollers	*					
Call Date Time	14/12/2021 • 10:23:41	\$					
Assignments Priority	3 🛊 *		Prior Calls :				
SLA				CallDate Ca	allTime D	escription	
			CN0005298 1	14/12/2021 10):23:41 Pa	aper not feeding through	rollers
Hold History Date Required	14/12/2021 -		CN0000543 1	17/11/2017 13		est call swap out po statu:	3
Order No	PO12345					ull set of toners required	
						est all functions on the co	
Pending History	JulandaK						nsaction processing checks
Status	N - New					oan unit - Alternate Issue	
Optional No	ACCTS002		CN0000647 2	23/05/2017 08	3:00:00 T	T010 - Daily, Colour 1000	- Call per WO
On Site Info 1			•				Þ
Meters Dpen Windows *				Licer + Juland	ak 15/12/2	021 Version : 2 5 0 4	Example Company v2.5.0.0

- 2. "The Contact Maintenance screen will be displayed." on page 3
- 3. Add the contact details as required and click on **Save**.



A											
₩ -	2				ce - BPO: Version 2.5.0.						
Home Equ	upment / Locations Co	ntract Fin	ance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Se	ervice Reporting	Utilities — 🗗	х
💾 😏 🗙											
Save Back Delete											
	-3 This co	ntact should	be set up a	as							\$
Process	4 - 6	Standard C	Contact								
			_								
Contact Type	Standard Contact		•								
First Name	Kelly		*								
Last Name	Jones		•								
Preferred Name	Kelly										
Supervisor	Julia Ritson		•								
Title	Administrative Manager										
Email Address	kelly.jones@Hope Works	(Pty) Ltdco.z	a *								
Group Email	group@Hope Works (Pty)) Ltdco.za									
Phone Number	031 123 4567		•								
Fax Number	031 123 4545										
Mobile Number	083 698 4561										
Address	Plot 91 Leaf Road Leaf Hills Pink Town Durban South South Africa	م	*								
Credit Limit		0.0	0								
Primary Contact											
Open Windows 🕶						L	Jser : JulandaK	15/12/2021	Version : 2.5.0.4	Example Company v2.5.0	.0 //.

- 4. You will return to the **Call maintenance** screen.
- 5. When you receive the **Contact Processing** message to confirm that;
 - Contact maintenance for customer : [customer code] complete.
- 6. Click on OK.
- The new contact will now be available when you use the **search** button in the Contact field.



¢ ▼ 4	Call maintenance : Call ref CN00052	98 - BPO: Version 2.5.0.4 - Examp	le Company v2.5.0.0	
Home Equipment / Locations Contra	act Finance / HR Inventory Maintena	ance / Projects Manufacturing P	Procurement Sales	Service Reporting Utilities - 🗗 🗙
Save Back Close Complete Assign Hol	Pending Release Reinstate Save La	ayout Workspaces Print No	ote	
		• •		
Maintain 4 Proc	ess a 7	Format 🚽 Print 🖌 Infi	4 O	~
Links 4		Relates To :		5
Enter text to search P Customer	Hope Works (Pty) Ltd 🔎 … 🕇 *	ReferenceType	ReferenceNo	
Contact	Kelly Jones *	Serial No	1020-10101	
Functions		Prior Call Reference		
	031 123 4567	Call Request Reference		
Work Orders 1 Address	Plot 91 Leaf Road P ··· A	Contract No Location	CO000050	
	Pink Town	Project Reference		
	Durban South 👻	Ouote Reference		
Work In Progress Call Type	Repair 👻 *	Invoice Reference		
		Order Reference		
Error Code	Contact Processing		×	555
Description	Paper			
Notes Call Date Time		r customer : HOP001 complete.		
Assignments Priority	3			
		ОК	CallTime D	
SLA	•			Description aper not feeding through rollers
Hold History Date Required	14/12/2021 -	CN0000543 17/11/2		est call swap out po status
Order No	PO12245	CN0000519 07/08/2		ull set of toners required
		CN0000516 03/08/2		est all functions on the copier
Logged By	JulandaK	CN0000510 13/07/2	017 08:45:37 T	est call for invoice and transaction processing checks
Pending History Status	N - New	CN0000501 29/06/2	017 16:14:01 L	oan unit - Alternate Issue
		CN0000647 23/05/2	017 08:00:00 T	T010 - Daily, Colour 1000 - Call per WO
Optional No	ACCTS002			
On Site Info 1		4		•
Meters				
Open Windows 👻		User	: JulandaK 15/12/2	021 Version : 2.5.0.4 Example Company v2.5.0.0

EDIT CUSTOMER ADDRESS

1. Click on the Edit [...] (ellipsis) button in the Address field.

	t/Locations Contra					BPO: Version 2.5 / Projects Manu			-		Reporting	Utilities	
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ve Back Close Cor	nplete Assign Hold	Pending R	elease	Reinstate	Save Layou	t Workspaces	Print N	lote					
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ks 4						Relates To :							
er text to search 🔎	Customer	Hope Works (Pt	ty) Ltd	م	+ *	ReferenceTyp Serial No	e	Reference 1020-1010					
unctions	Contact	Kelly Jones		م ر	• 1	Serial No Prior Call Refe		1020-1010	1				
Incuons	Contact No.	031 123 4567			1	Call Request R							
Work Orders 1			1			Contract No		CO000005	0	_			
Work Orders 1	Address	Plot 91 Leaf Ro Leaf Hills	ad	م	A	Location			-	_			
		Pink Town Durban South				Project Refere	ence						
					Ť	Quote Referen	nce						
Work In Progress	Call Type	Repair			*	Invoice Refere	ence						
	Error Code	Paper Jam			-	Order Referen	ice						
					<u> </u>								
Notes	Description	Paper not feedi	ng throug	gh rollers	÷ *								
Hotes													
					Ŧ								
	Call Date Time	14/12/2021	•	10:23:41	\$								
Assignments	Priority	3 🛔 *											
						Prior Calls : CallReference	CallDa	e CallT		Description			
	SLA					 CN0005298 	14/12/				ding through i	ollers	
Hold History	Date Required	14/12/2021	-			CN0000543	17/11/				out po status		
	Order No	0012245			_	CN0000519	07/08/				ers required		
	Order No	PU12045				CN0000516	03/08/				ons on the cop	bier	
	Logged By	JulandaK				CN0000510	13/07/					nsaction processi	ng checks
Pending History	Status	N - New				CN0000501	29/06/	2017 16:1	4:01 L	.oan unit - Al	ternate Issue		
						CN0000647	23/05/	2017 08:0	0:00 1	T010 - Daily	Colour 1000	- Call per WO	
	Optional No	ACCTS002											
On Site Info 1													
						4							

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- 2. The Address Maintenance for Customer screen will be displayed.
- 3. Make the necessary changes to the address as required, then click on **Save**.

⊕ <i>∓</i>	2	Address Mainte	nance for Cus	tomer HOP001 - BPO: Ve	rsion 2.5.0.4 - Ex	ample Compa	ny v2.5.0.	.0			_
Home E	quipment / Locations Cont	ract Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	_ & ×
Save Back											
	3										~
Process 4	•										
Address Type	Shipping	•									
Address 1	Plot 91 Leaf Road	•									
Address 2	Leaf Hills										
Address 3	Pink Town										
Address 4	Durban South										
Address 5	South Africa										
Postal Code	1234										
Country											
Tel. No.	031 123 4567										
Fax No.	031 123 4545										
GPS Longitude	30.759093										
GPS Latitude	-29.769727										
Open Windows 🕶					L	Jser : JulandaK	15/12/20	21 Versi	on : 2.5.0.4	Example Cor	mpany v2.5.0.0 //

- 4. You will return to the **Call maintenance** screen.
- 5. When you receive the **Address Processing** message to confirm that;
 - The address: [customer address] for customer has been saved.
- 6. Click on OK.



• •		Call maintena											
Home Equipmen	t / Locations Contra	ct Finance / HR	Inventory	Maintenance	/Projects Ma	nufacturing I	Procuremen	t Sales	Service	Reporting	Utilities	_ 6	9 X
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Save Back Close Co	mplete Assign Hold	Pendina Relé	Particular In			Print N	ote						
ave back Close Col	mplete Assign Hold	Pending Rele	ase Reinstate	Save Layou	it Workspaces	The Market Market	ote						
Maintain 4	Proce	155		Fo	ormat	Print / In	0 4						6
inks #					_Relates To :								_
nter text to search P	Customer	Hope Works (Pty)	td p.	• + •	ReferenceT	ype	Reference	eNo					
	Contact	Kelly Jones	5	• • •	Serial No		1020-101	01					
Functions					Prior Call Re								
	Contact No.				Call Reques				_				
Work Orders 1	Address	Plot 91 Leaf Road	م	·	Contract No		CO00000	50	_				
		Leat Hills Pink Town			Location Project Refe	10000	-		_				
		Durban South			Quote Refer								
Work In Progress	Call Type	Repair		-	Invoice Refe				-				
				_	Order Refer				_				
	Error Code	Address Processir					×						
	Description	Address Hocessii	9				~						
Notes		-		12									
		The ad	dress : Plot 91 L	eaf Road for	customer HOP0	01 has been sav	/ed.						
	Call Date Time												
Assignments	Priority												_
				6				ime D	escription				
	SLA									ding through r	ollers		
Hold History	Date Required	14/12/2021	•		CN0000543	17/11/2	017 13:1			out po status			
	Order No	PO12345		_	CN0000519	07/08/2				ers required			
					CN0000516	03/08/2		21:01 Te	est all functi	ons on the cop	ier		
	Logged By	JulandaK			CN0000510	13/07/2	017 08:4	45:37 Te	est call for in	voice and tran	saction proces	sing checks	
Pending History	Status	N - New			CN0000501					ternate Issue			
	Optional No			_	CN0000647	23/05/2	017 08:0	00:00 T	T010 - Daily	, Colour 1000	Call per WO		
	Optional No	ACCTS002											
On Site Info 1													
					-								<u> </u>
Meters													
Ipen Windows 🔻						Use	r : Julandak	15/12/2	021 Versi	on: 2.5.0.4	Example Comp	bany v2.5.	0.0

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