

SERVICE

INTRODUCTION TO CALLS

The **Call Listing** screen is used to log billable and non-billable service calls against contract and non-contract machines.

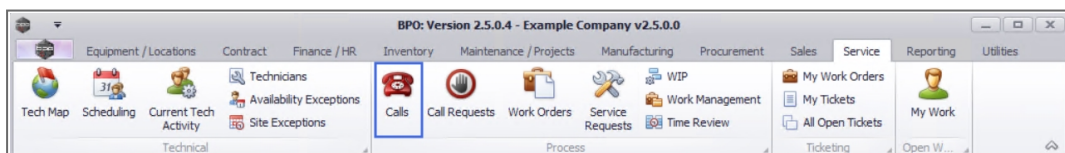
New Deal Sale and New Deal Rental processing will also process through the call centre which will enforce stock issue before invoicing.

Technicians or Drivers are assigned to calls.

When a call is logged, a Work Order is created within the call. The Work Order maintains all the details for work done, including Labour, Parts, Expenses, Travel, Sub Contract Work, etc.

Additional Work Orders can be created within a single call, for additional work, that needs to be completed.

Ribbon Access: *Service > Calls*



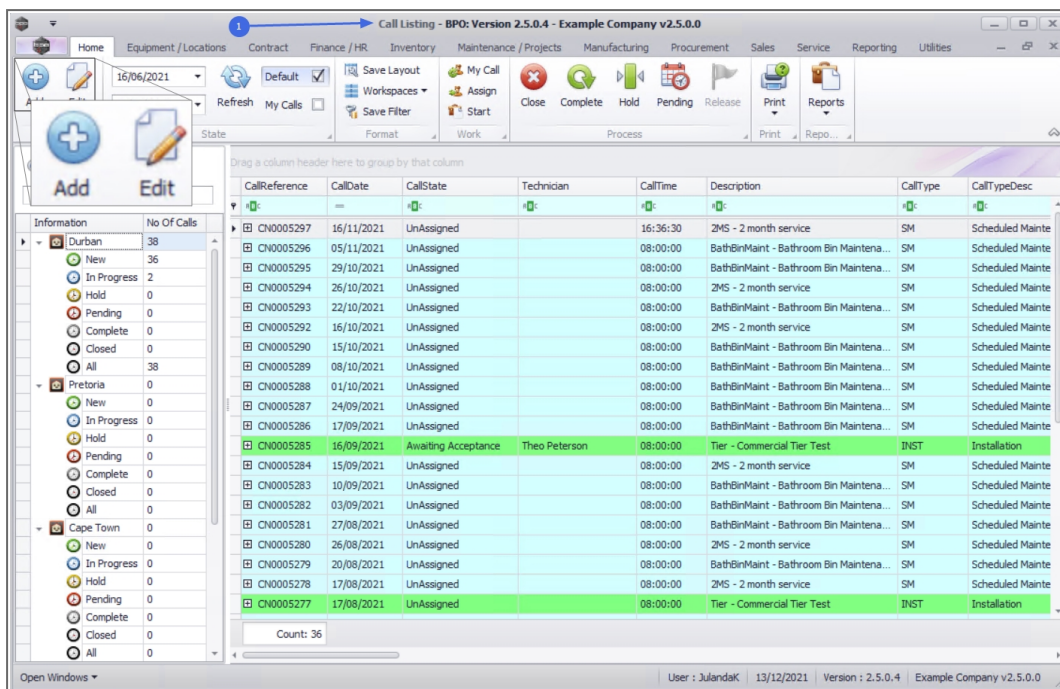
1. The **Call Listing** screen will be displayed.

RIBBON ACTION BUTTONS

MAINTAIN ACTION BUTTONS

- From the Call Screen click on **Add** or **Edit** to be directed to the **Call maintenance** screen. Refer to [Calls - Log a Call](#) or [Calls - Edit](#)

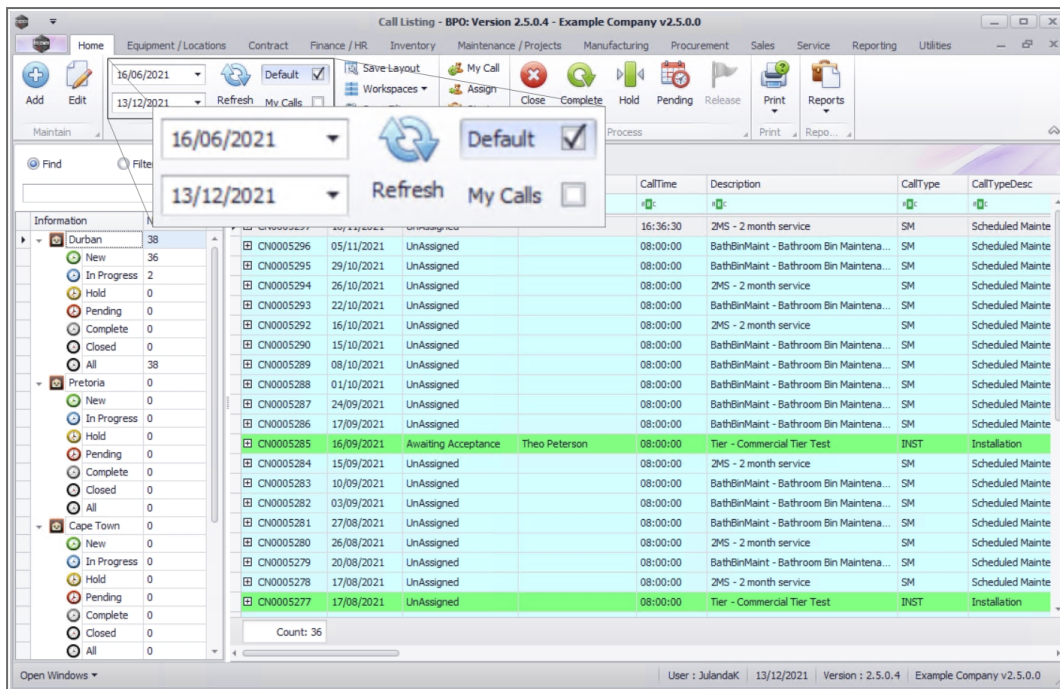
a Call



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005297	16/11/2021	UnAssigned		16:36:30	ZMS - 2 month service	SM	Scheduled Mainte
CN0005296	05/11/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005295	29/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005294	26/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005293	22/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005292	16/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005287	24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
CN0005284	15/09/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005282	03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005281	27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005280	26/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005278	17/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005277	17/08/2021	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation

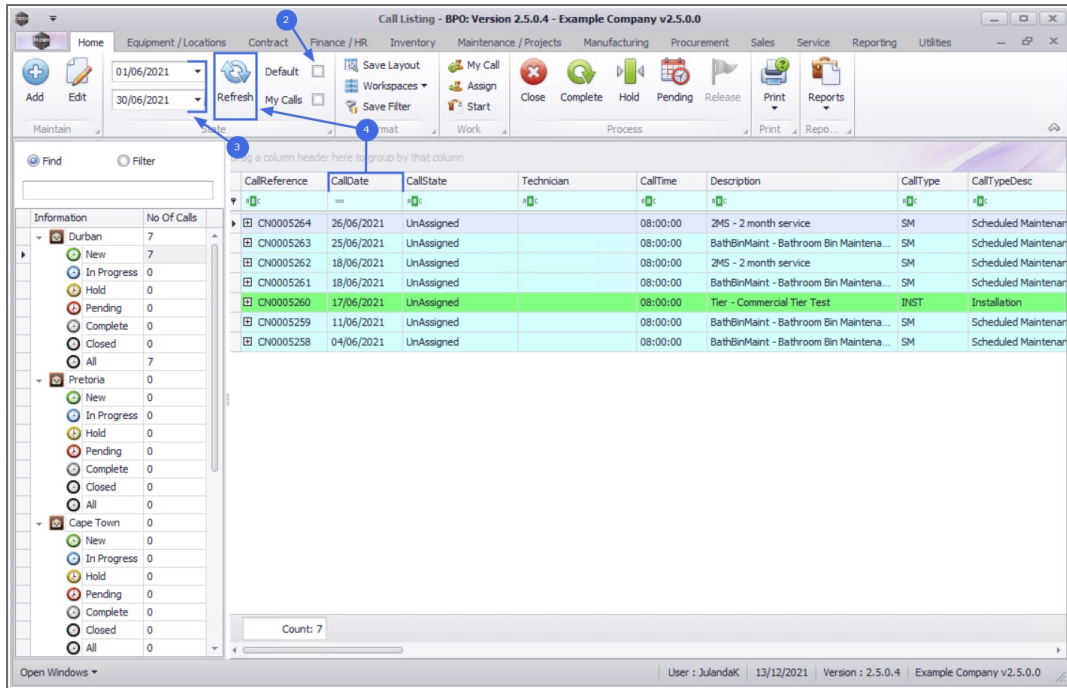
STATE ACTION BUTTONS

- The calls displayed in the call data grid, are filtered by the **date range** selected. Change the date range to view older calls, or to refine the call list.
- Default** has been checked by default. The default period in the date range is configured in the **Company Configuration** data and is set to **180** days.
- Calls can be filtered by selecting **My Calls**. Refer to [Calls - My Calls](#)



Change Call Date Range

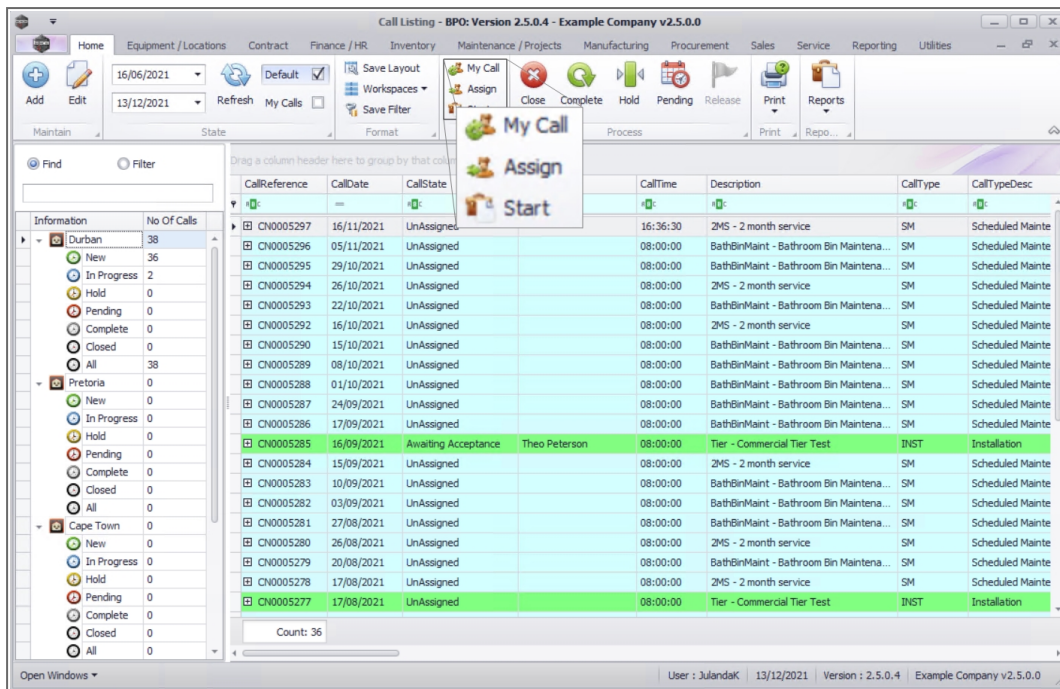
2. Deselect the **Default** check box,
3. Click on the down **arrow** in the **date range** fields to adjust the date range using the **calendar function**.
4. Click on **Refresh** to update the call list screen with the calls within the Call Date range.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005264	26/06/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenan
CN0005263	25/06/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenan
CN0005262	18/06/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenan
CN0005261	18/06/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenan
CN0005260	17/06/2021	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation
CN0005259	11/06/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenan
CN0005258	04/06/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenan

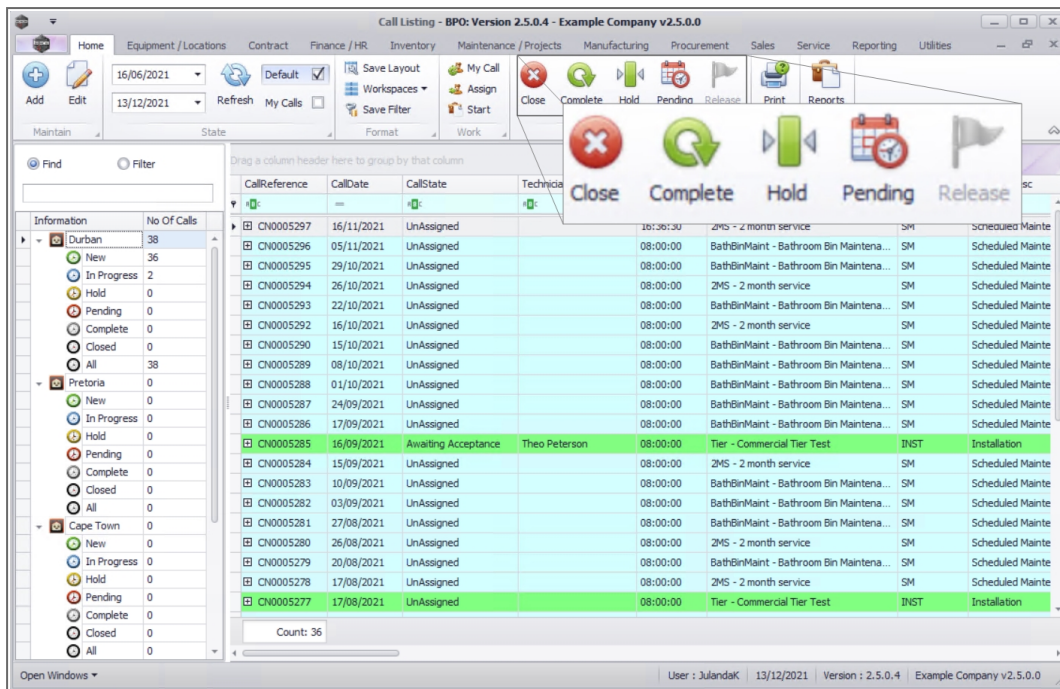
WORK ACTION BUTTONS

- My Call will assign a call to the user who is currently logged onto BPO.
- Assign will assign a call to an employee and will move the call to the In Progress status.
- Start will begin the Start Work process for the Call.



PROCESS ACTION BUTTONS

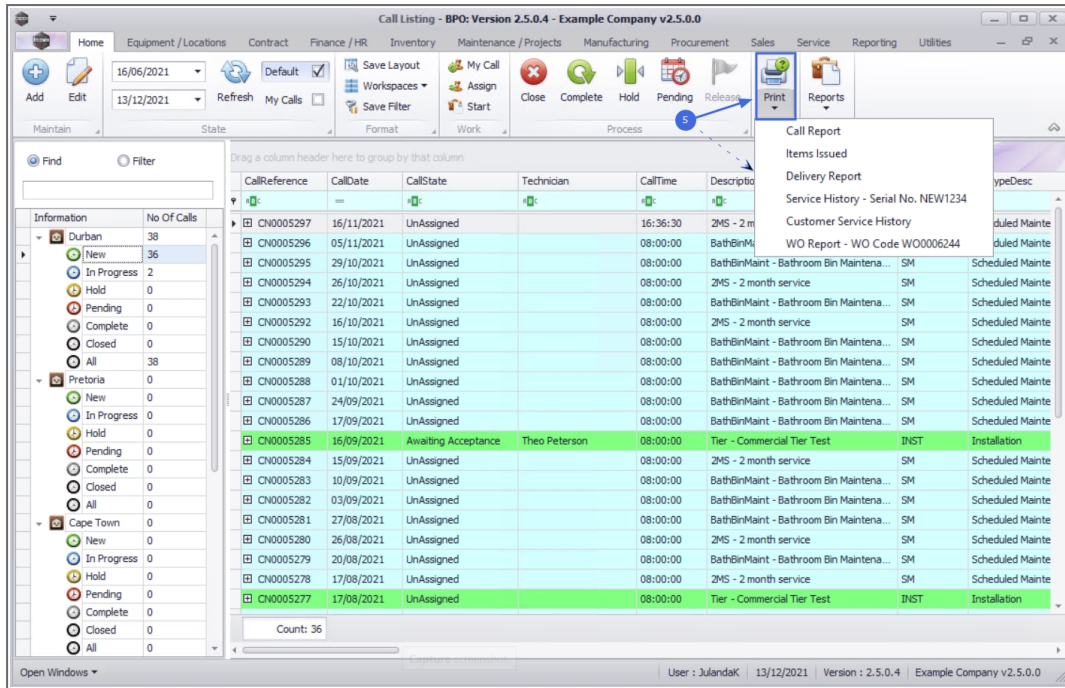
- **Close** a call when there are no further outstanding items on the call. Closed calls can only be viewed in the All status and cannot be re-opened once they have been closed.
- **Complete** a call once a technician has completed the required work. Outstanding admin work, like updating or Invoicing the call, can still be done.
- **Hold** will place a call on hold when work needs to be stopped while a customer issue is being resolved. The SLA monitor will be "paused" until the call has been released from hold.
- **Pending** differs from hold, in that work will be stopped to resolve an internal company issue, such as unavailability of stock. The SLA Monitor will continue to run for calls in this status.
- **Release** a call that has been placed on hold or pending. The call will move back to the New status where it can be re-assigned.



REPORTS

5. The Print action button will display a drop down menu with report options that can be selected for a call;

- Call Report
- Items Issued
- Delivery Report
- Service History
- Customer Service History
- Work Order Report



THE SITE / STATUS PANEL

This panel shows all the sites that have been configured on the system, with a separate status list for each site.



Note that you do not need to select the site or a status before creating a Call. The system will place the Call in the site where the *asset* is located.

- **New:** The total number of new Calls logged. These call have not yet been assigned to and accepted by a technician.
- **In Progress:** The total number of Calls that are assigned, or have been accepted by Technicians.
- **Hold:** The total number of Calls placed on Hold due to *client issues*, e.g. a technician may not be able gain access to a site location as the client is unavailable to open the building.



Note that the **SLA Monitor** will be paused for calls in this status.

- **Pending:** The total number of Calls placed in pending due to a company issue, e.g. a technician may not have boot stock to complete a job on site.



Note that the **SLA Monitor** will continue to run for calls in this status.

- **Complete:** The total number of Calls where technicians have completed the work required. The service centre can now complete Call updates and invoice the Call, where required.
- **All:** The total number of all the calls for the site is listed, including closed Calls.

Call Listing - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

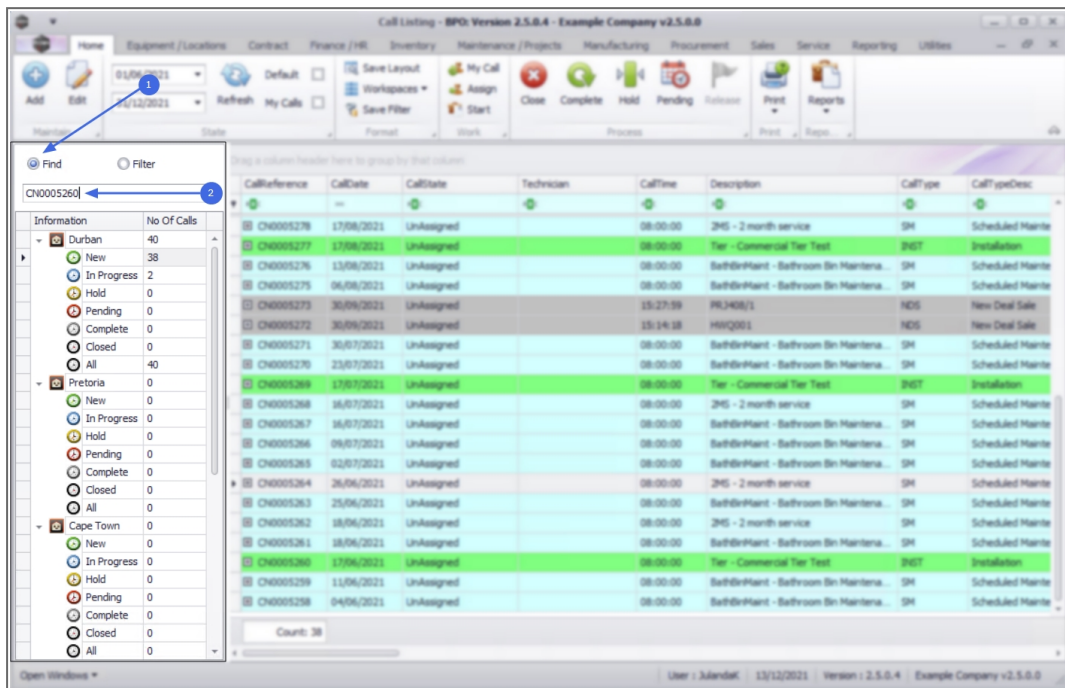
CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005297	16/11/2021	UnAssigned		16:36:30	ZMS - 2 month service	SM	Scheduled Mainte
CN0005296	05/11/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005295	29/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005294	26/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005293	22/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005292	16/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005287	24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
CN0005284	15/09/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005282	03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005281	27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005280	26/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Mainte
CN0005278	17/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Mainte
CN0005277	17/08/2021	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation

Count: 36

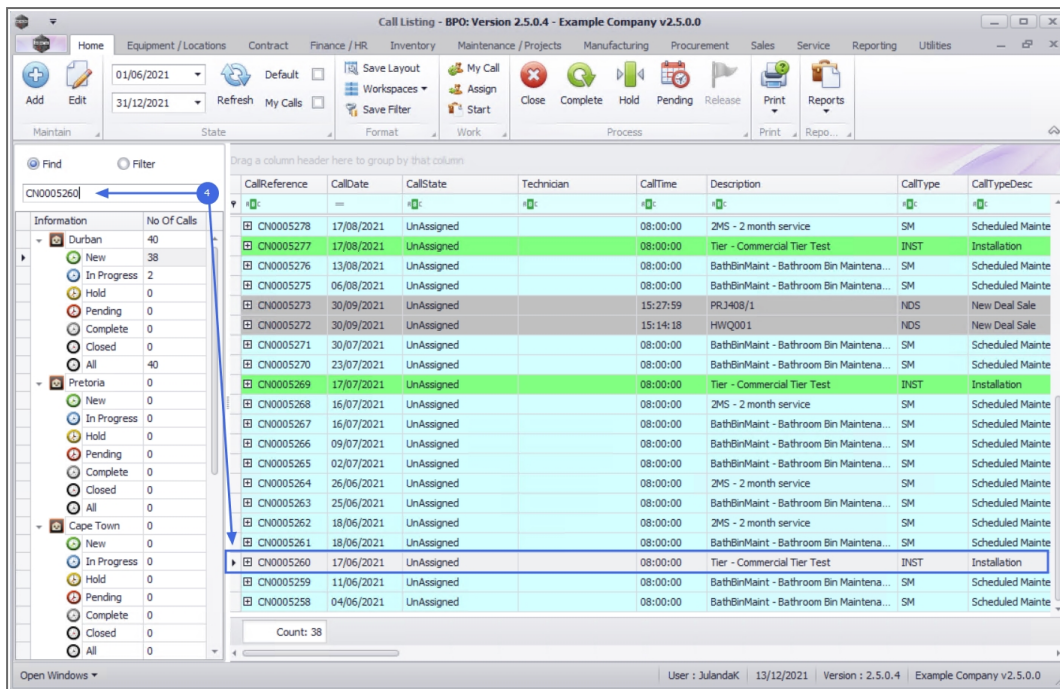
FIND A CALL

You can find any call, regardless of the site, status or date range.

1. Click on the **Find** radio button.
2. Type in the **call number** you wish to locate in the **text box**.
3. Press **Enter**.



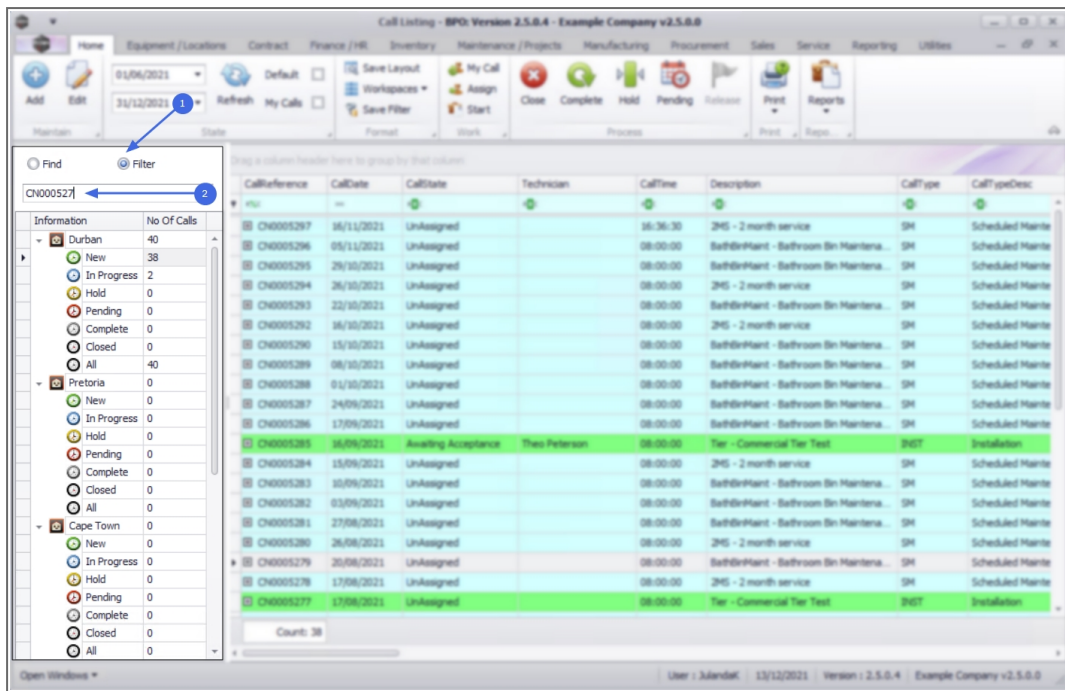
4. The **row** containing the call number you have searched for, will be selected in the call list screen.



CALL FILTER

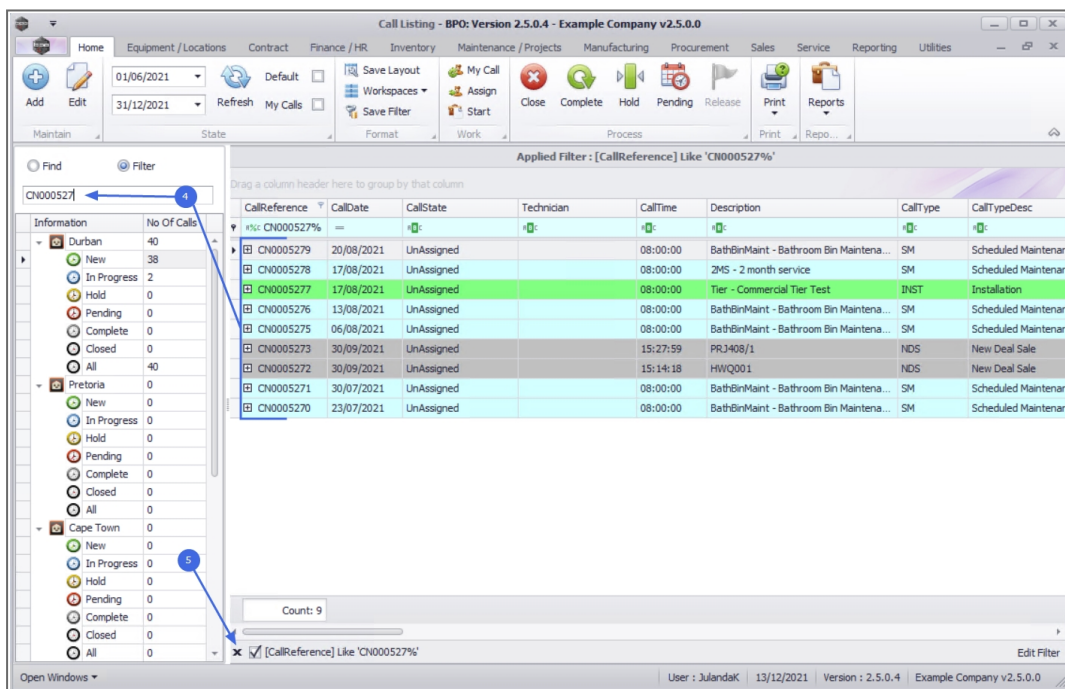
You can filter a range of calls that contains the specific prefix.

1. Click on the **Filter** radio button.
2. Type in the **prefix** you wish to filter the call list by, in the **text box**.
3. Press **Enter**.



4. The call numbers that match the prefix you have specified, will be listed in the call list screen.

5. To **remove** the filter, click on the 'x' in the Call Reference line.



CALL LIST DATA GRID

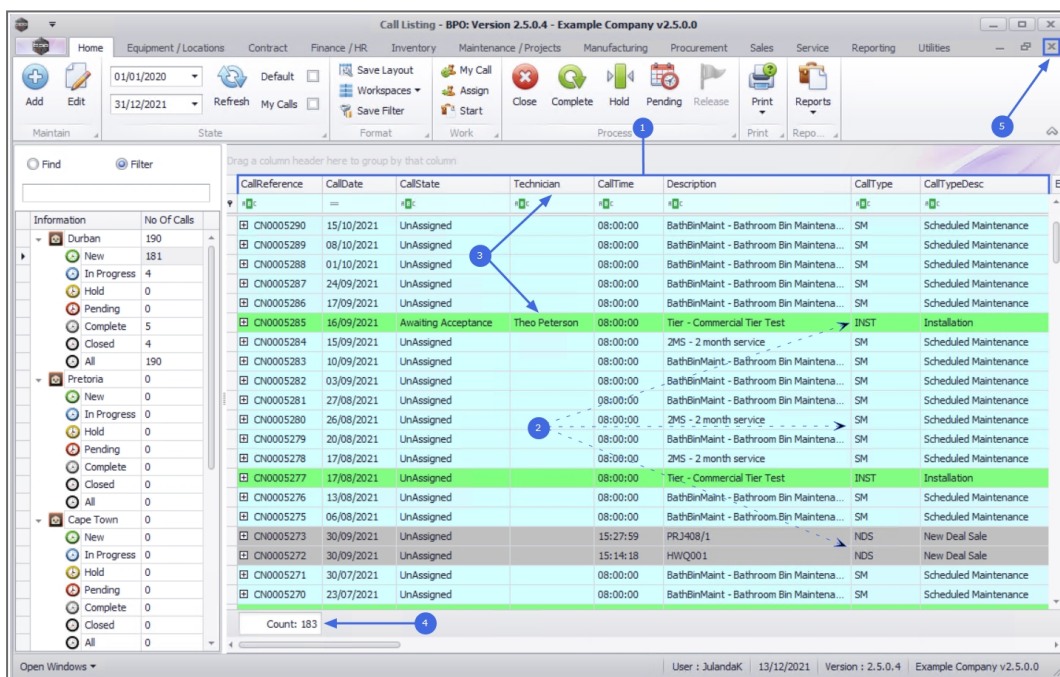
1. The data grid displays a list of all the calls within the selected **site**, **status** and **date range**.
2. The calls are colour-coded by **Call Type**.



Note that you can configure the **call types** and **call type colours** as required.

ASSIGNED TECHNICIANS

3. The **last assigned technician** for each call, can be viewed in the **Technician** column.
4. **Count:** at the bottom of the call data grid, will display the number of calls listed in the data grid.
5. **Close** the screen when done.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005287	24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
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CN0005284	15/09/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
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CN0005282	03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005281	27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005280	26/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CN0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005278	17/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CN0005277	17/08/2021	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation
CN0005276	13/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005275	06/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005273	30/09/2021	UnAssigned		15:27:59	PRJ408/1	NDS	New Deal Sale
CN0005272	30/09/2021	UnAssigned		15:14:18	HWQ001	NDS	New Deal Sale
CN0005271	30/07/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CN0005270	23/07/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance

Count: 183

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