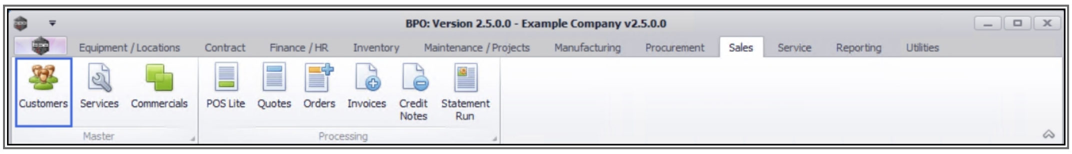
SALES

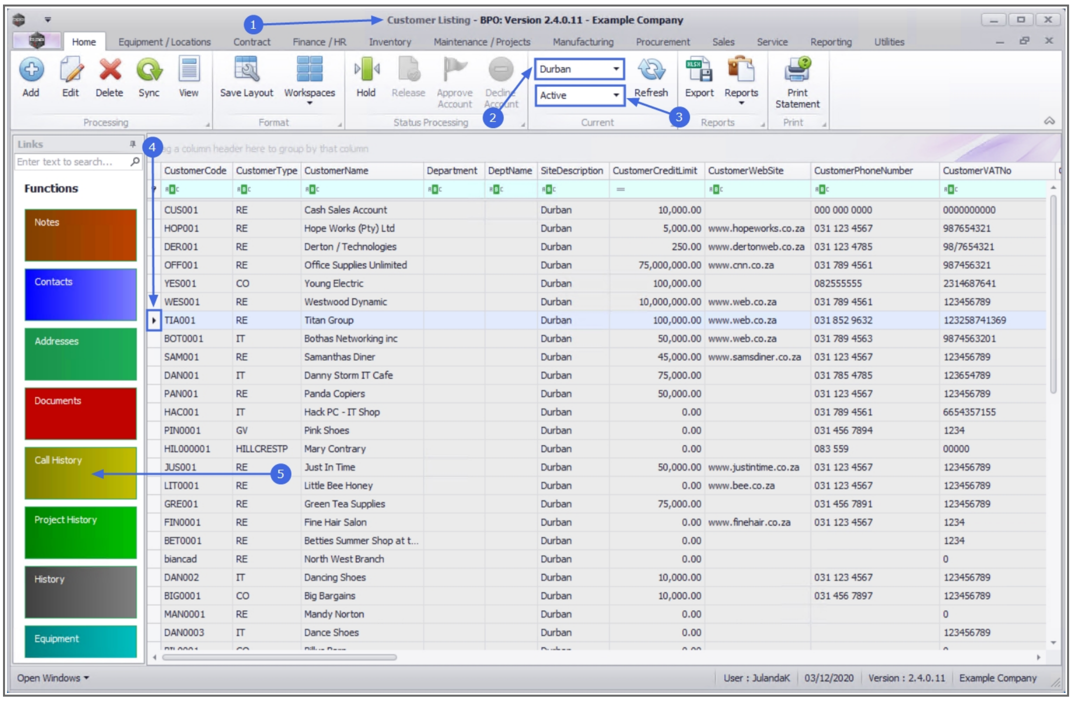
CUSTOMERS - CALL HISTORY

The **Call History** tile can be found in both the Customer Listing and the Customer Maintain screen. This tile will direct you to a data grid of history regarding Calls linked to a ***specific*** customer.

Ribbon Access: *Sales > Customers*



1. The ***Customer Listing*** screen will display.
2. Select the ***Site*** where the customer can be located.
    - The example has ***Durban*** selected.
3. Ensure that the ***Status*** has been set to ***Active***.
4. Click in the ***row*** of the customer for whom you wish to view the ***Call History*** for.
5. Click on the ***Call History*** tile.

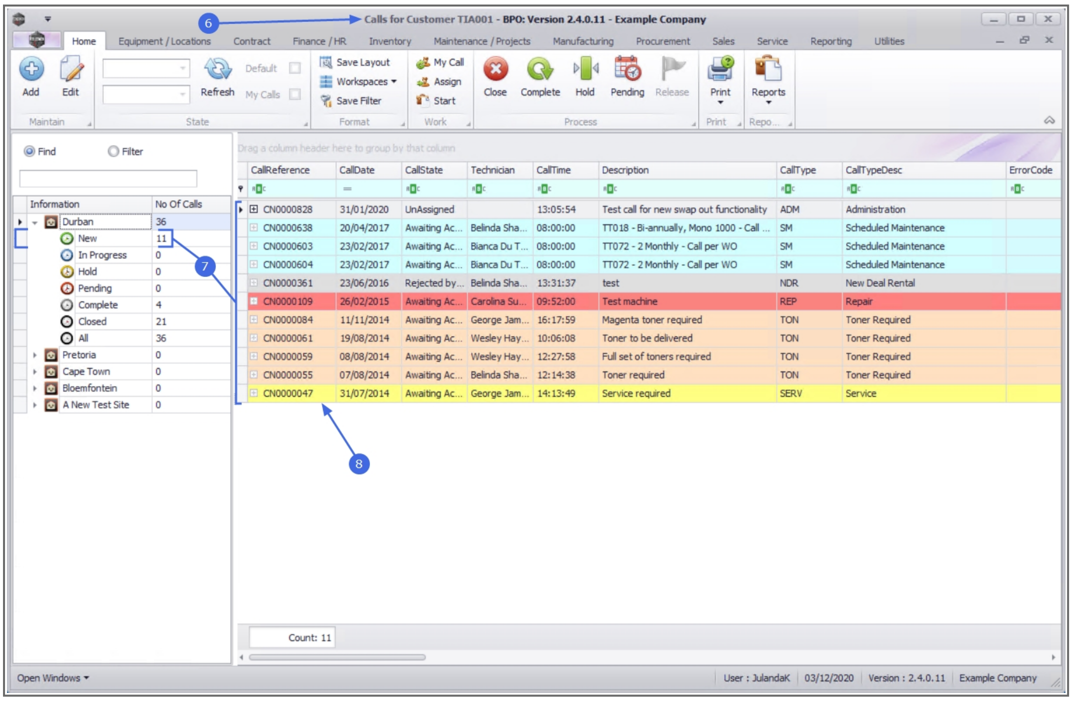


6. The ***Calls for Customer*** *[customer code]* screen will display.

CALLS DATA GRID

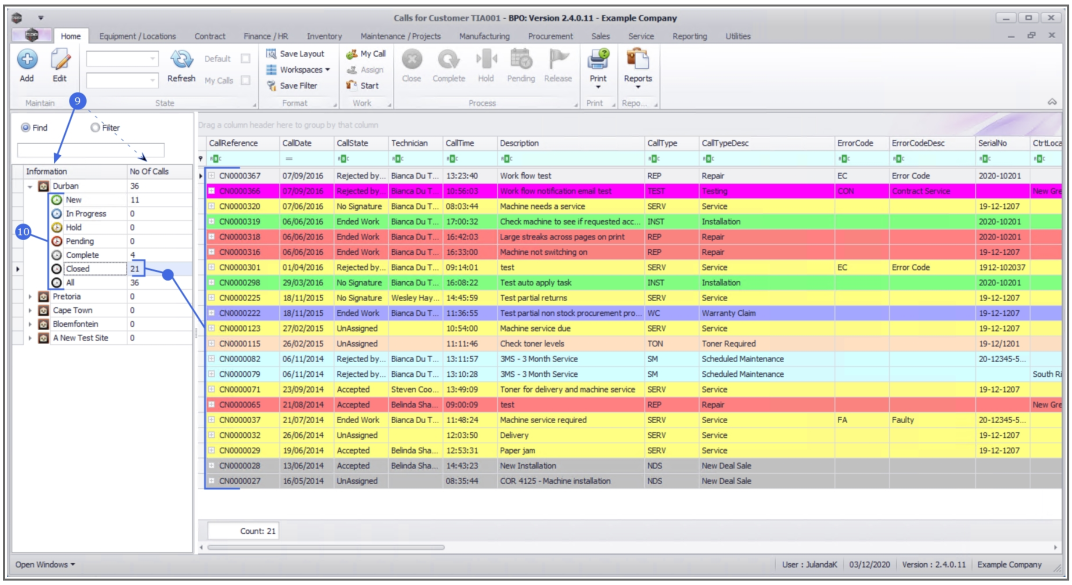
7. By default, all ***New*** calls linked for the selected customer will display.
8. The Calls are colour-coded by ***Call Type***, e.g. all ***Service*** Calls are displayed as yellow.

> Call Type Colours can be configured according to your company requirements.



INFORMATION PANEL

9. The ***Information*** panel lists the number of calls for each Call Status.
10. You can select to view any Call Status, by clicking on one of the ***Call Status*** discs on the left of the panel.
    - The example has the ***Closed*** Call Status selected and all the Closed calls for the customer are displayed in the ***Calls for Customer*** data grid.

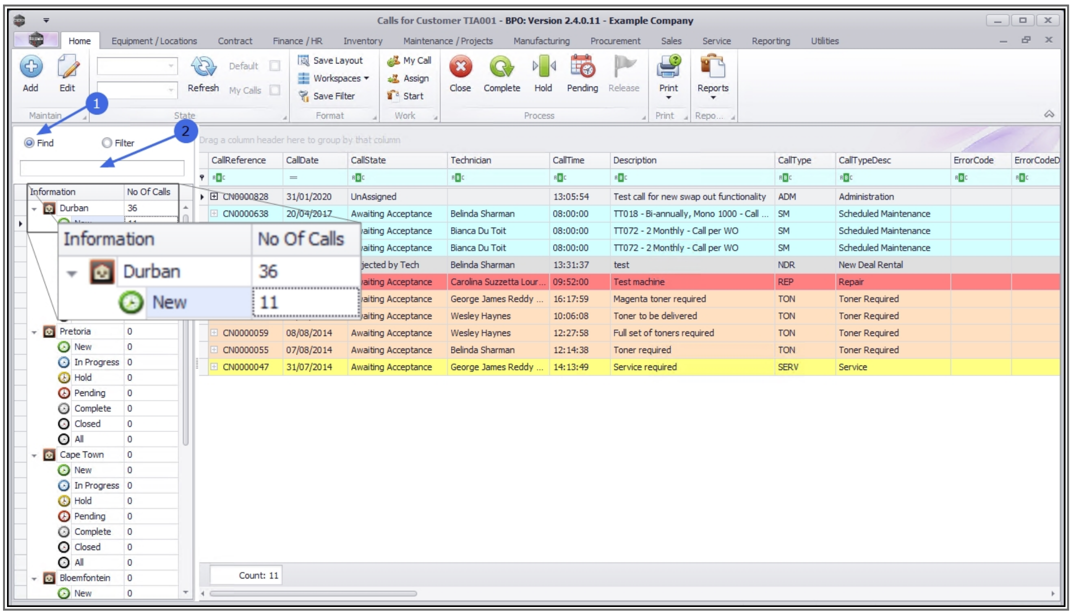


FIND OPTION

The *Find* option allows you to search for a specific Call, regardless of site, status or date range, using the *Call Reference* number.

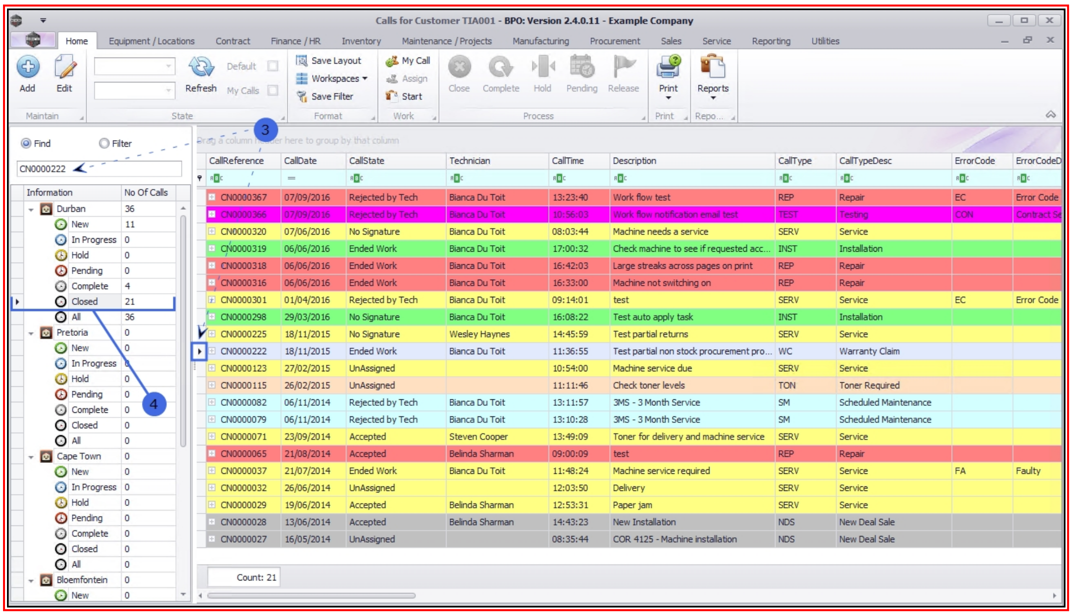
1. Make sure that the ***'Find' radio button*** is selected.
2. In the text box, type in the full ***Call Reference*** number that you wish to find, then press ***Enter***.

Note that the example is currently open in the *Durban* ***Site*** and the ***Status*** is set to New.



3. The example is set to search for **CN0000222**.
    - The system has filtered for this Call Reference number and selected it.
4. The search has resulted in the Call being located in the ***Closed*** status.

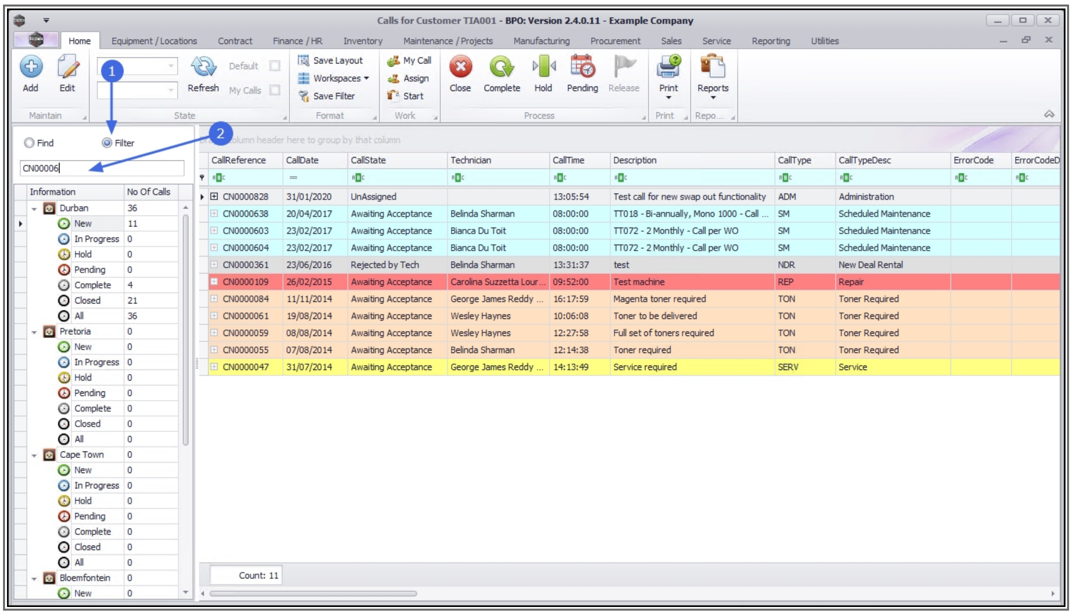
Note that if the full reference number is not entered, the system will not be able to search for the specific Call and will return an *error* message.



FILTER OPTION

The *Filter* option allows you to specify a range of Calls by typing the prefix or part of the Call Reference number.

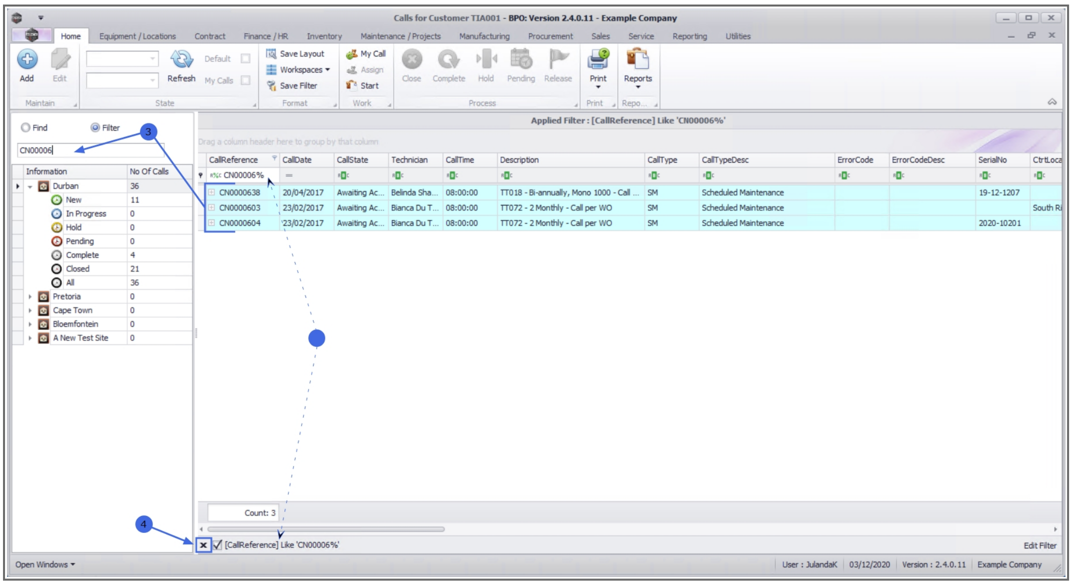
1. Make sure that the ***'Filter' radio button*** is selected.
2. Type the ***Call Reference*** number up to the point where you would like to display the range and press ***Enter***.



3. The example has the Reference **CN00006** entered, which will search for and display all the Call References that start with CN00006.

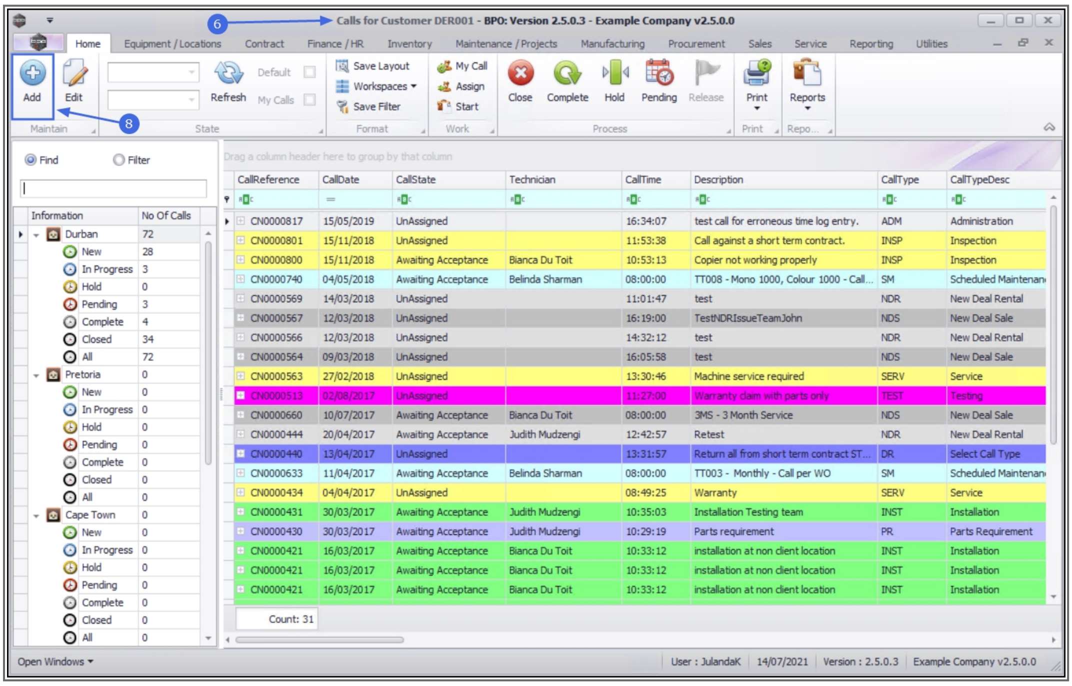
> Note that the Call Reference column filter row added the '%' variable at the end of the Call Reference, and the Edit Filter row now contains the filter details: [Call Reference] Like 'CN00006%'.

4. To ***remove*** the Filter, either, ***Delete*** or ***backspace*** over the text in the in the *Filter Row* of the ***Call Reference*** column, or click on the [**X**] in the ***Edit Filter*** row.

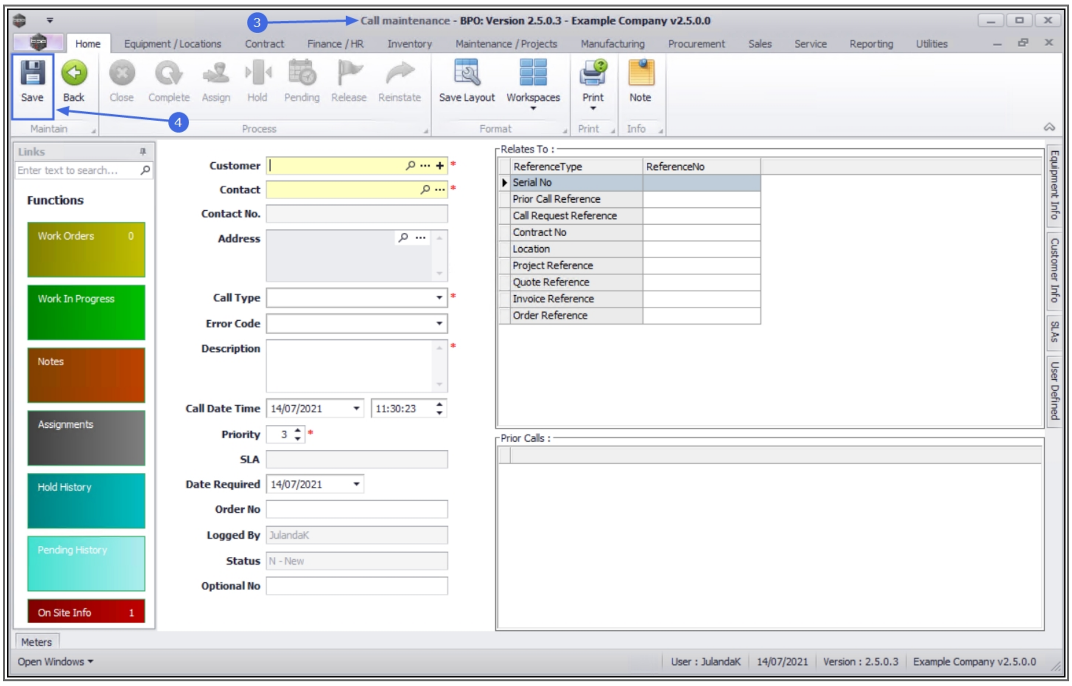


LOG A CALL

1. From the ***Calls for Customer [****customer code****]*** screen,
2. Click on ***Add***.

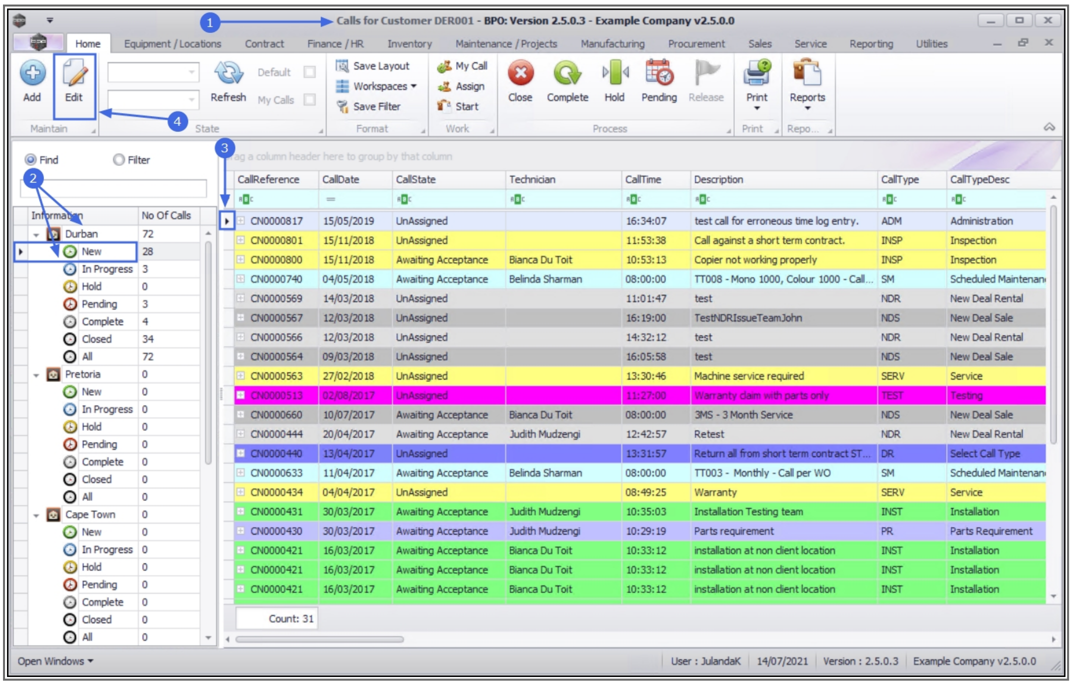


3. " The Call maintenance screen will be displayed. " on page 2
4. Complete the Call information for the Customer and click on ***Save***.

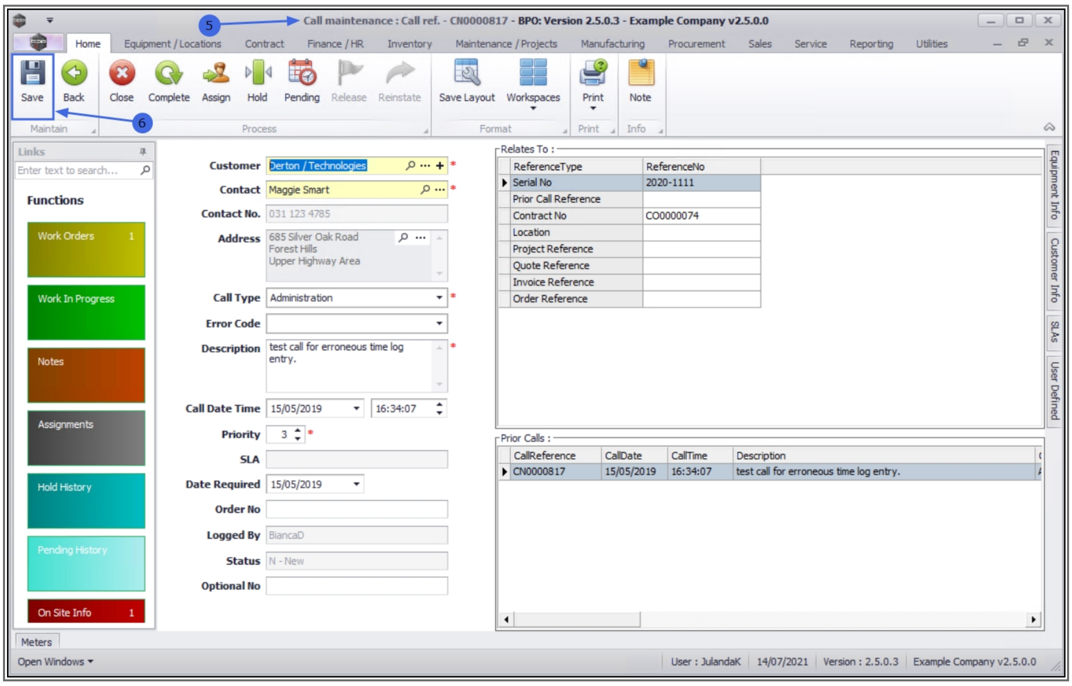


EDIT A CALL

1. From the ***Calls for Customer [****customer code****]*** screen,
2. Select the ***Site*** and ***Call Status***.
    - The example has ***Durban*** and ***New*** call status selected.
3. Click on the ***row*** of the Call you with to edit.
4. Click on ***Edit***.



5. " The Call maintenance: Call ref. - [call ref number] screen will be displayed. " on page 2
6. Make the necessary changes to the Call information and click on ***Save***.



STATE PANEL

In the State panel the following filters are not available in this view, because all the calls linked to the specific customer are displayed:

- **Start Date,**
- **End Date,**
- **Default** and
- **My Calls**.

The **Refresh** button will update the ***Calls for Customer*** screen with the latest version of the information. Any changes made from the ribbon will be updated in the Call List data grid.

FORMAT PANEL

Any changes that you may have made to the ***Calls for Customer*** screen e.g. changing the column order or resizing columns, will return to the original lay-out when you exit the screen. By clicking on ***Save Layout***, ***Workspaces*** or ***Save Filter*** in the ***Format*** panel, will save your settings for the next time you select a customer and open this screen.

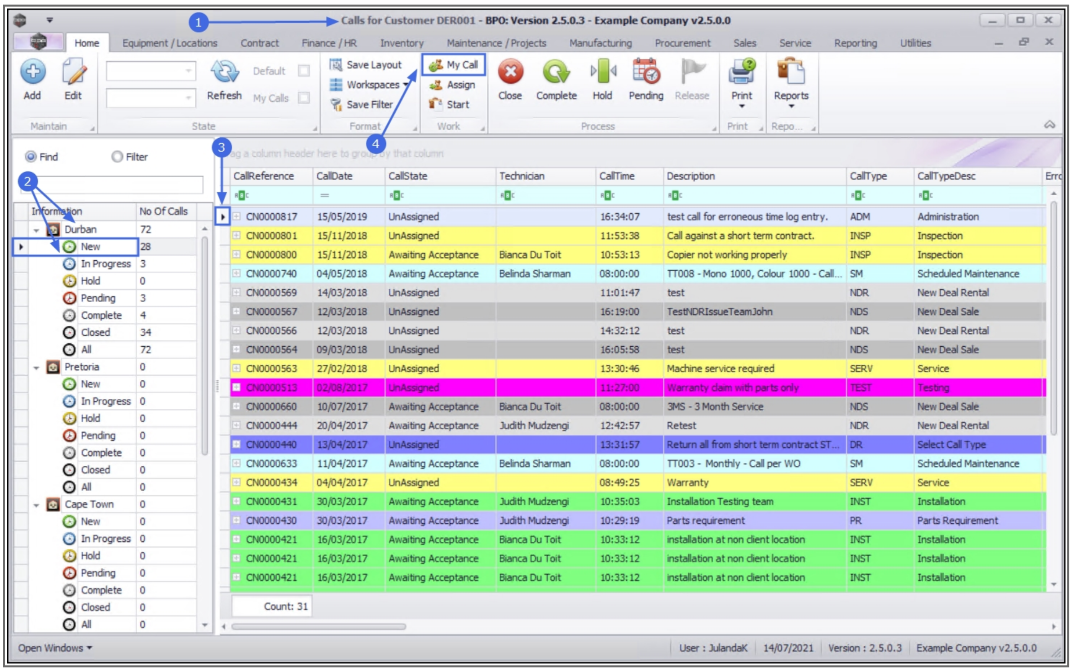
For a detailed handling of this topic refer to BPO2 Data Grid Layouts

MY CALL

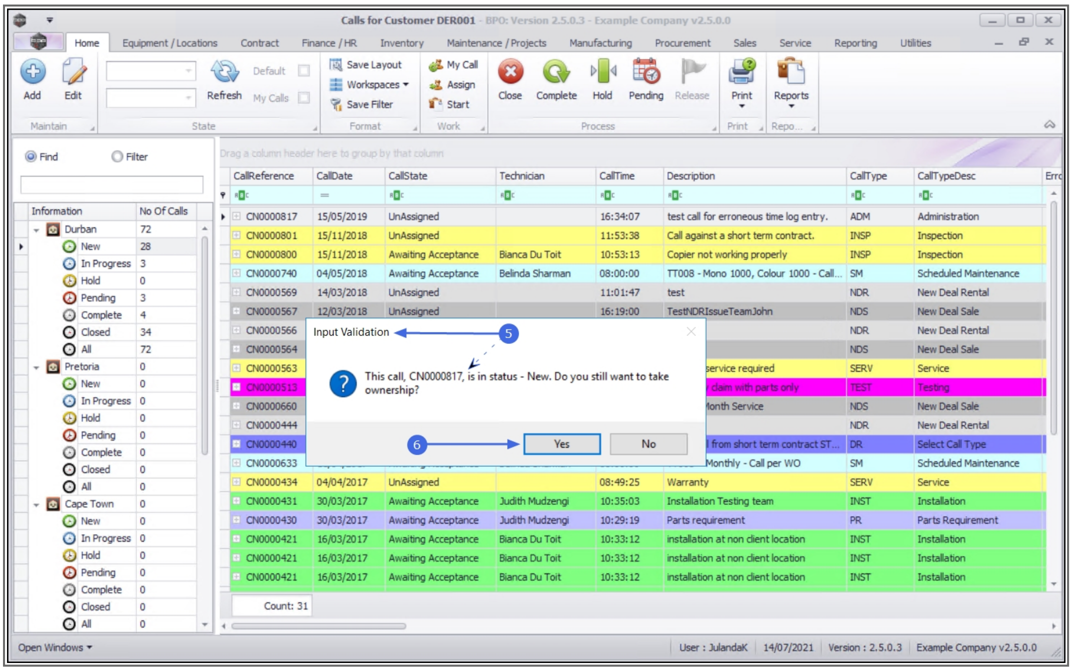
1. From the ***Calls for Customer [customer code]*** screen,
2. Select the ***Site*** and the ***Call Status***.
   - The example has ***Durban*** and ***New*** call status selected.
3. Click on the ***row*** of the Call you wish to assign to yourself.

> Note that the *Technician* field is currently empty and the *Call State* is UnAssigned.

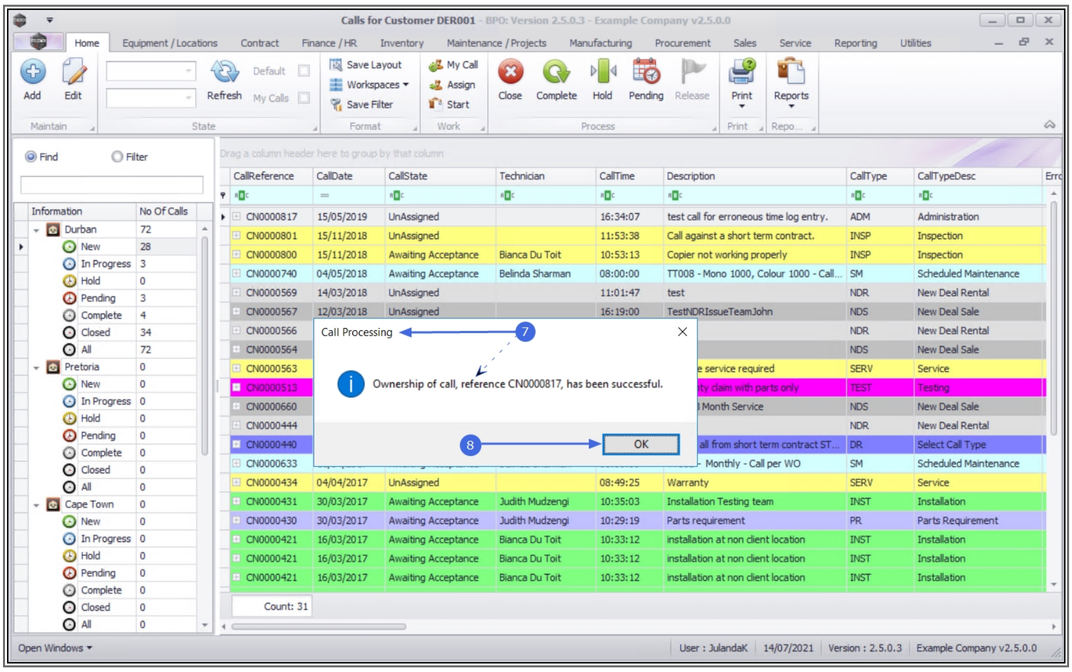
4. Click on ***My Call***.



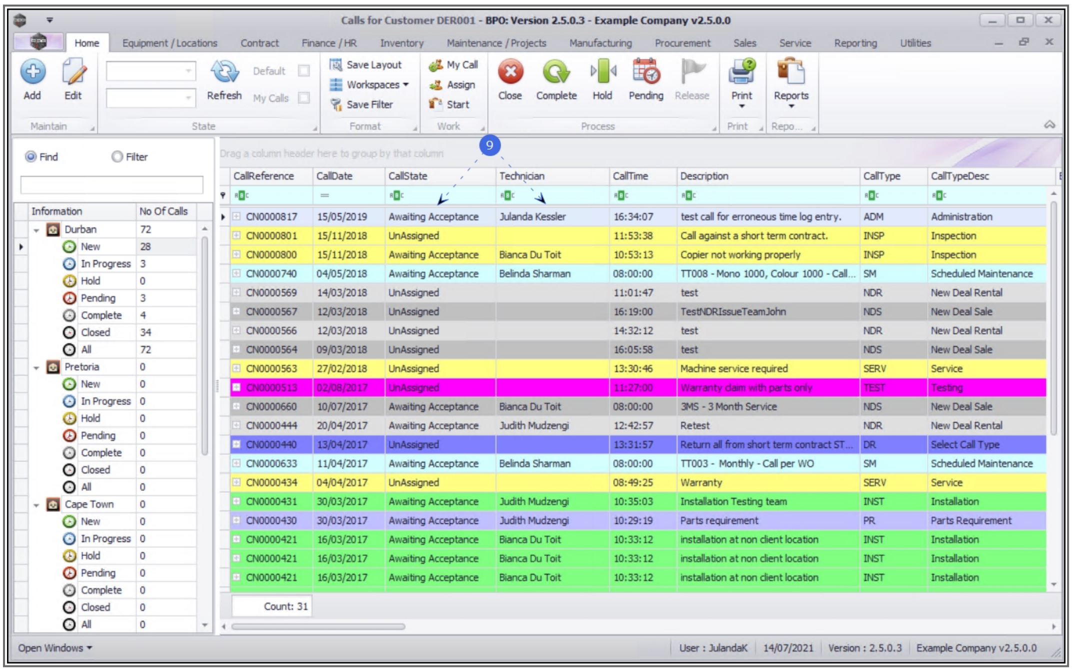
5. When you receive the ***Input Validation*** message to confirm;
   - ***This call, [**call ref number**], is in status - [**status**]. Do you still want to take ownership?***
6. Click on ***Yes***.



7. Next you will receive the ***Call Processing*** message to confirm;
   - ***Ownership of call, reference [****call ref number**]***, has been successful.***
8. Click on ***OK***.



9. The call has now been updated with the name of the ***Technician*** currently logged on to the system and the ***Call Status*** has changed to Awaiting Acceptance.



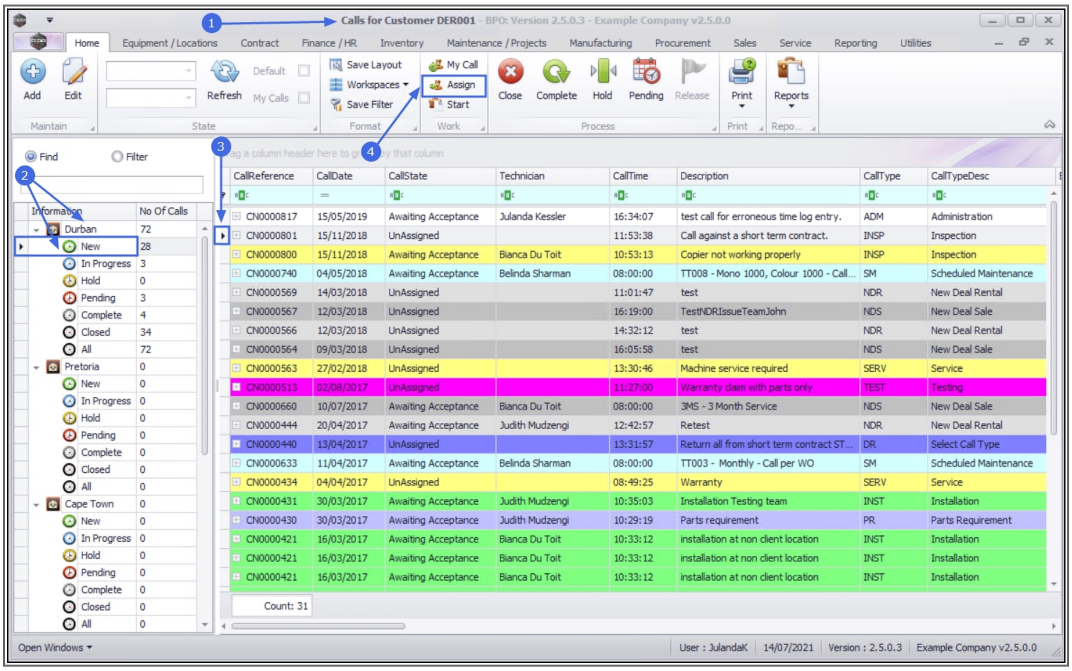
ASSIGN A CALL

By assigning an employee to a call, will move the call to the *In Progress* status. By assigning the call to a Technician, Driver, or Responsible Person will identify who will be working on the call.

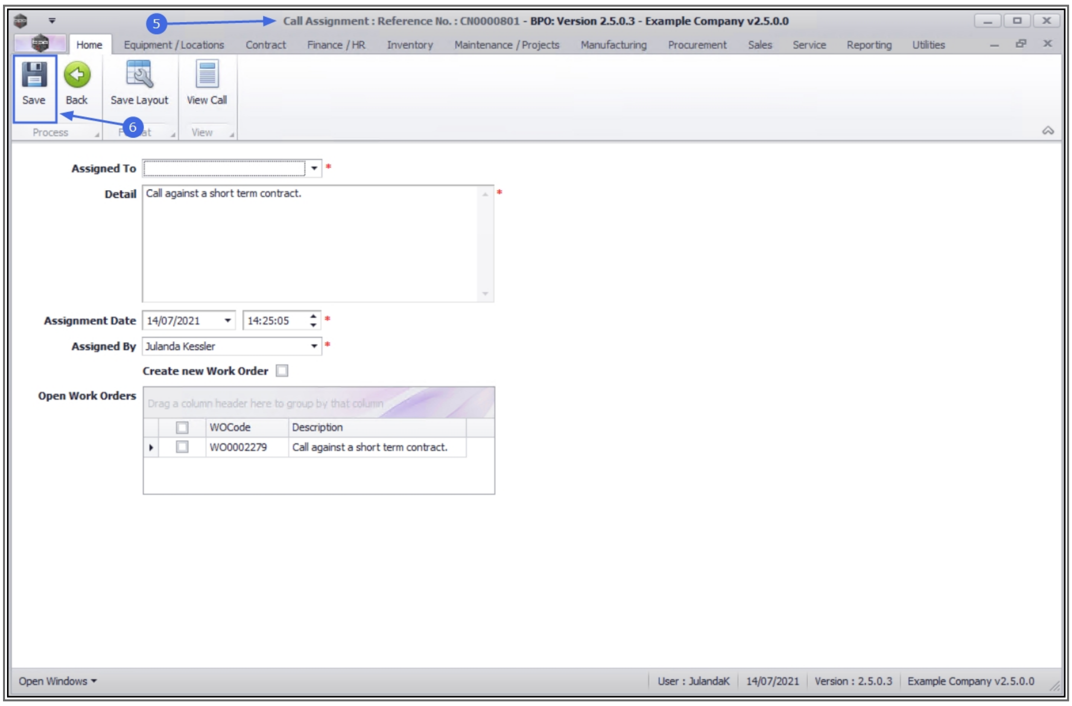
1. From the ***Calls for Customer [****customer code****]*** screen,
2. Select the ***Site*** and the ***Call Status***.
   - The example has ***Durban*** and ***New*** call status selected.
3. Click on the ***row*** of the Call you wish to assign.

   Note that the *Technician* field is currently empty and the *Call State* is UnAssigned.

4. Click on ***Assign***.



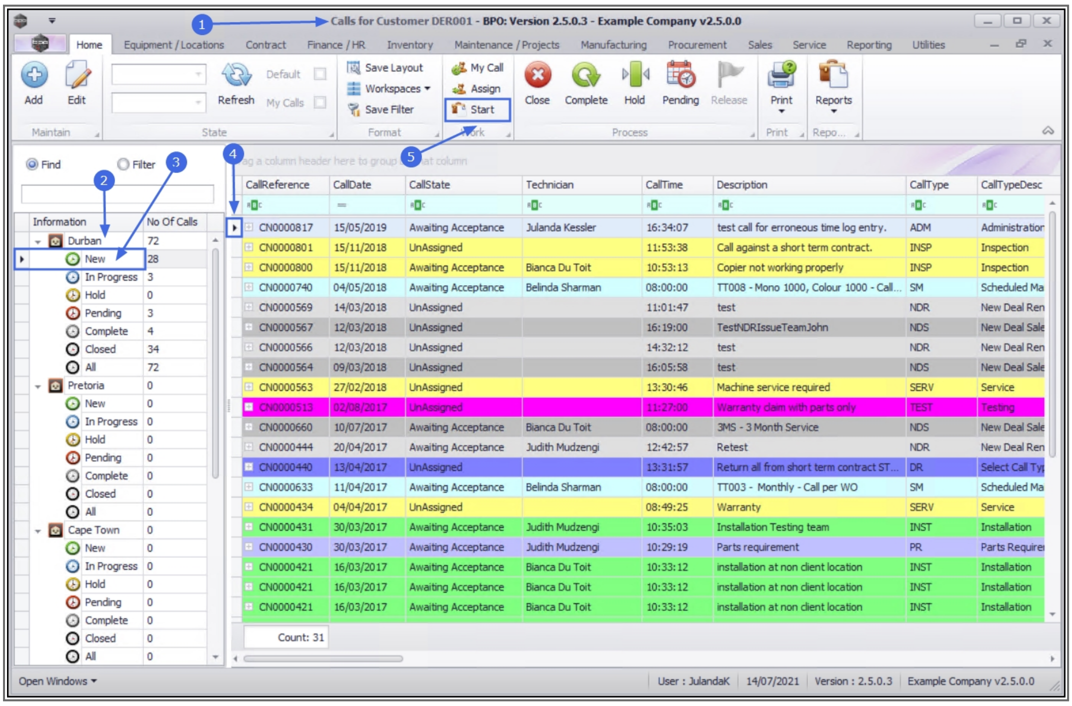
5. " The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 3
6. Complete the Call Assignment information and click ***Save*** when done.



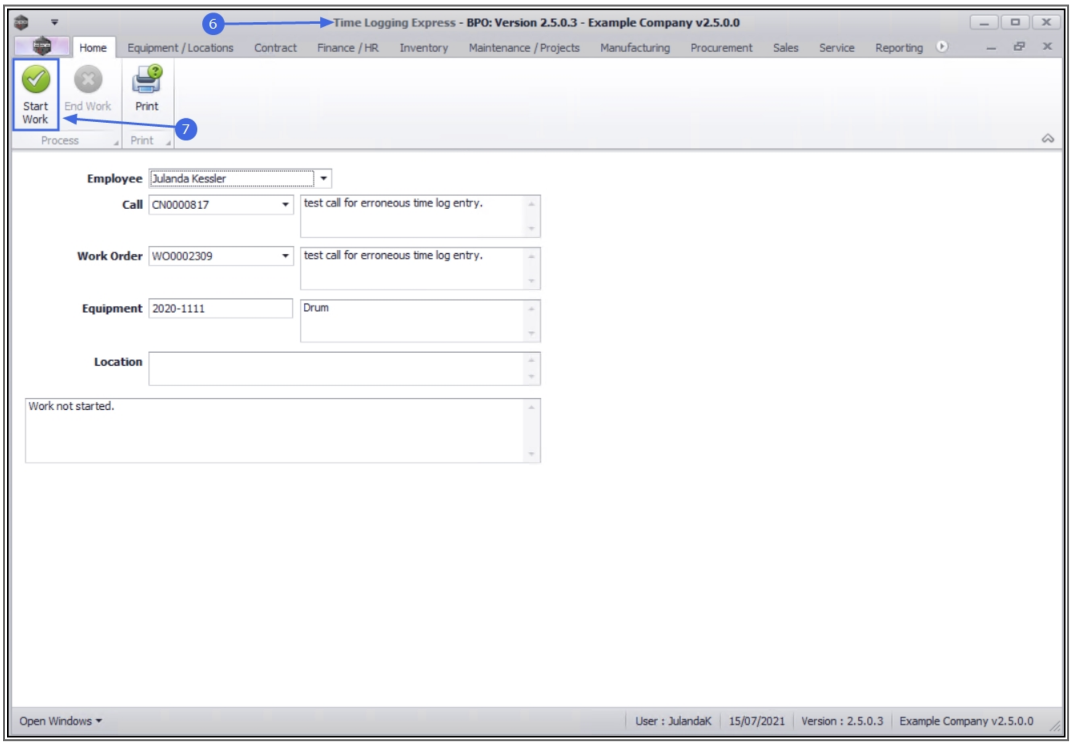
START WORK

Use the *Start Work* feature to *Start* and *End* work on Calls that you are working on. A Call must be in the *New* status to Start Work, and will then move to the *In Progress* status where you can continue the process until End Work.

1. From the ***Calls for Customer [****customer code****]*** screen,
2. Select the ***Site***.
    - The example has ***Durban*** selected.
3. Ensure that the ***Call Status*** is set to ***New***.
4. Click on the ***row*** of the Call you wish to start work on.
5. Click on ***Start***.



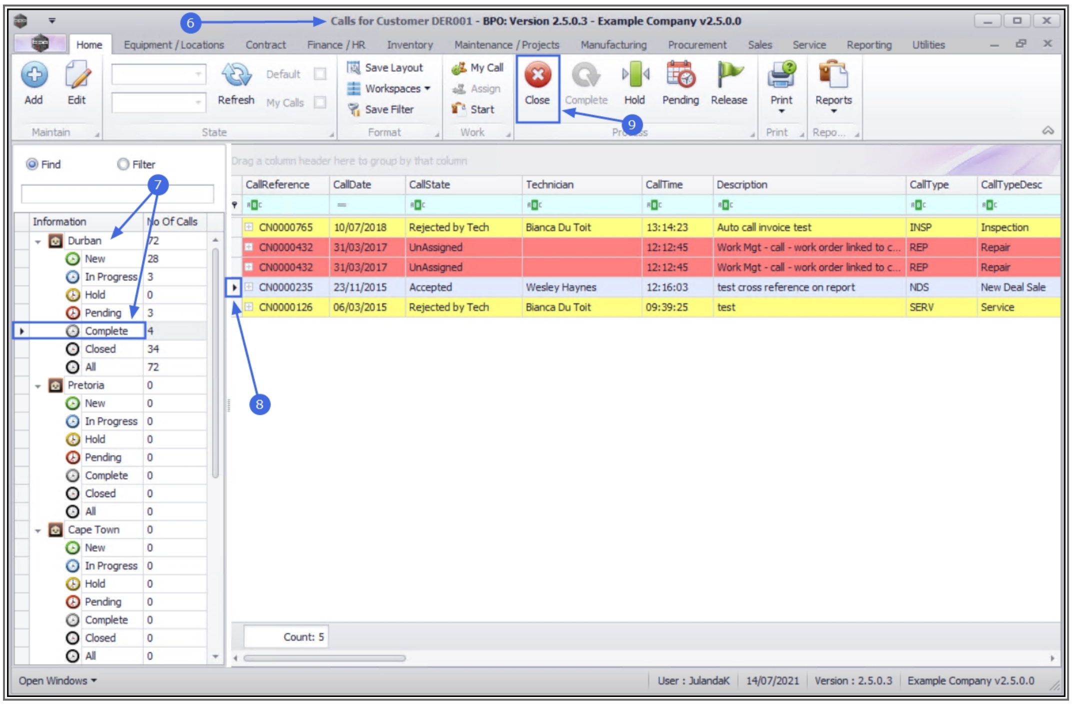
6. " The Time Logging Express screen will be displayed. " on page 2
7. Complete the Time logging screen and click on ***Start Work***.



CLOSE A CALL

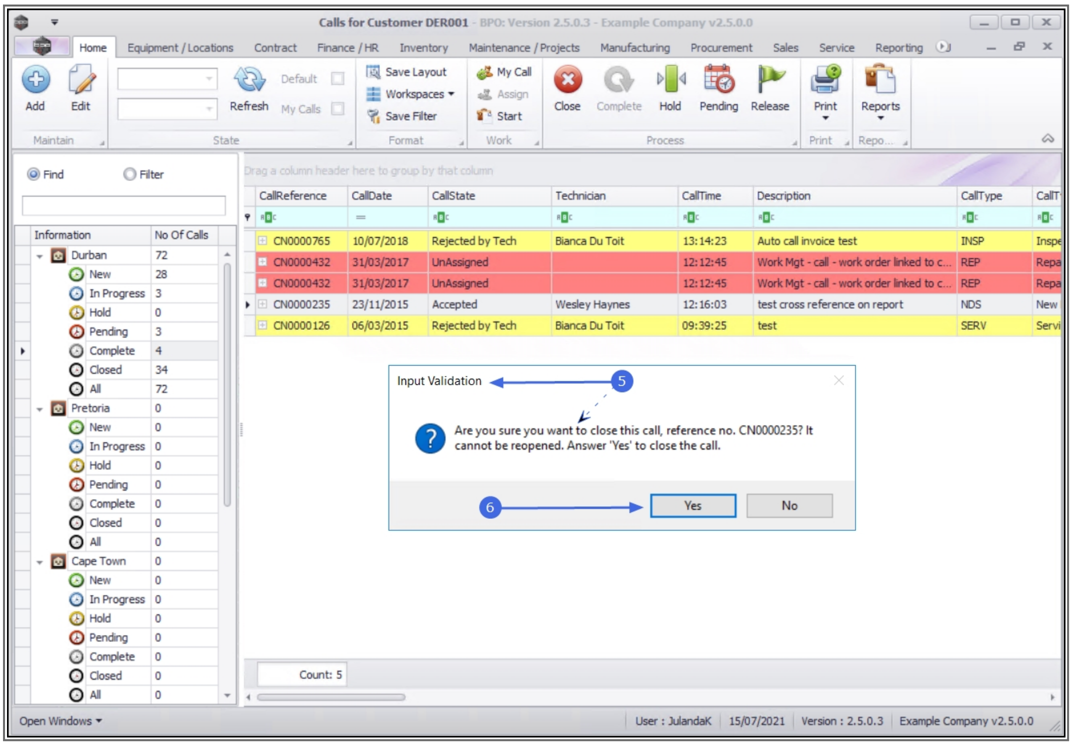
When a call has been closed, it cannot be re-opened, and can only be viewed. You will receive a notification when trying to close a Call that have outstanding items, such as billable items not yet invoiced, linked to the call.

1. From the ***Calls for Customer [****customer code****]*** screen,
2. Select the ***Site*** and ***Call Status***.
   - The example has ***Durban*** selected and the status has been set to ***Complete***.
3. Click on the ***row*** of the Call you wish to close.
4. Click on ***Close***.



5. When you receive the ***Input Validation*** message to confirm;
   - ***Are you sure you want to close this call, reference no. [****call ref number****]? It cannot be reopened. Answer 'Yes' to close the call.***
6. Click on ***Yes***.

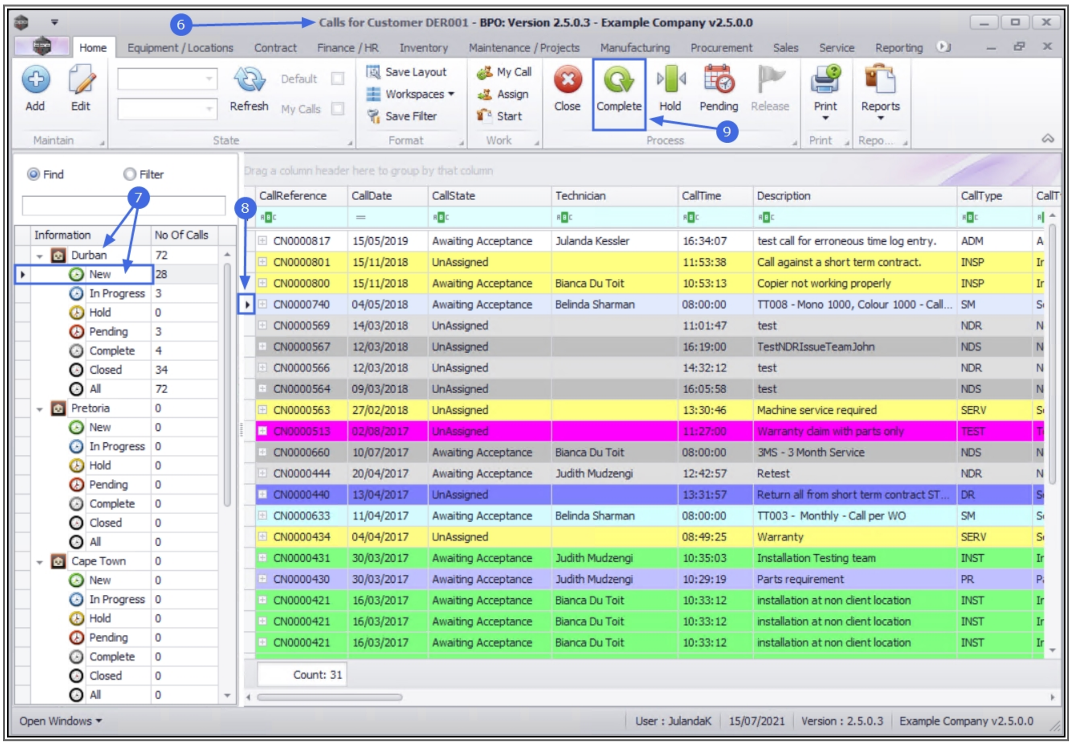
For a detailed handling of this topic refer to Calls - Close a Call



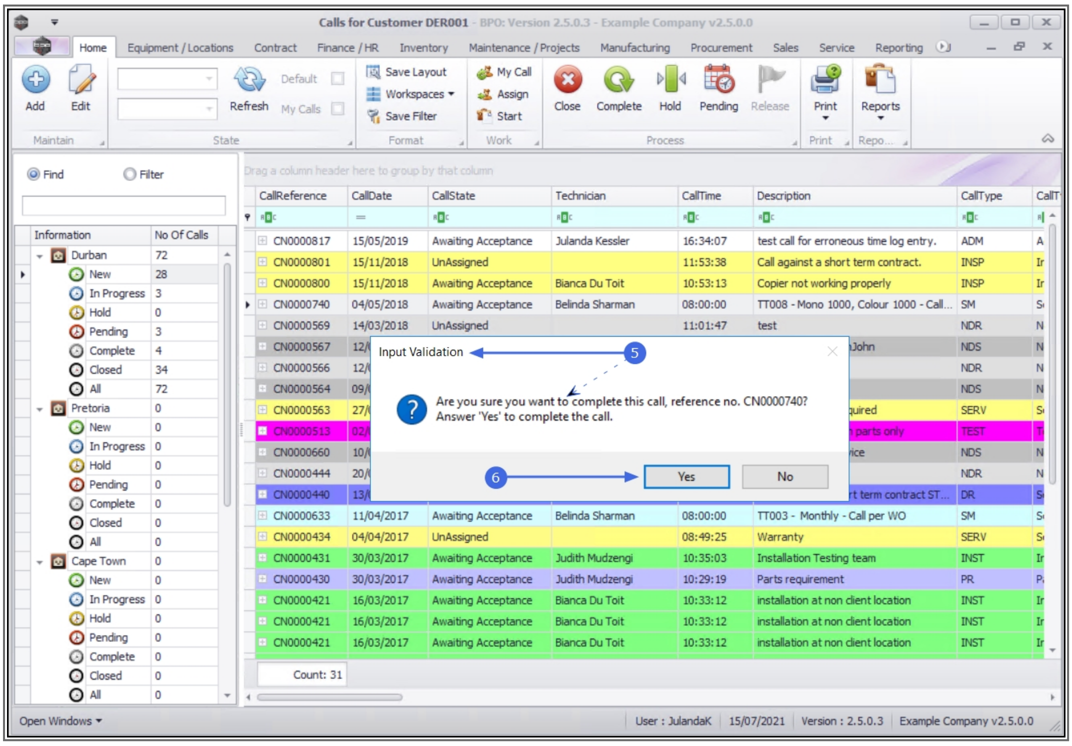
COMPLETE A CALL

Once the Technician has completed the work required, the call can be set to *Completed*.

1. From the ***Calls for Customer [customer code]*** screen,
2. Select the ***Site*** and ***Call Status***.
   - The example has ***Durban*** selected and the call status is ***New***.
3. Click on the ***row*** of the Call you wish to complete.
4. Click on ***Complete***.

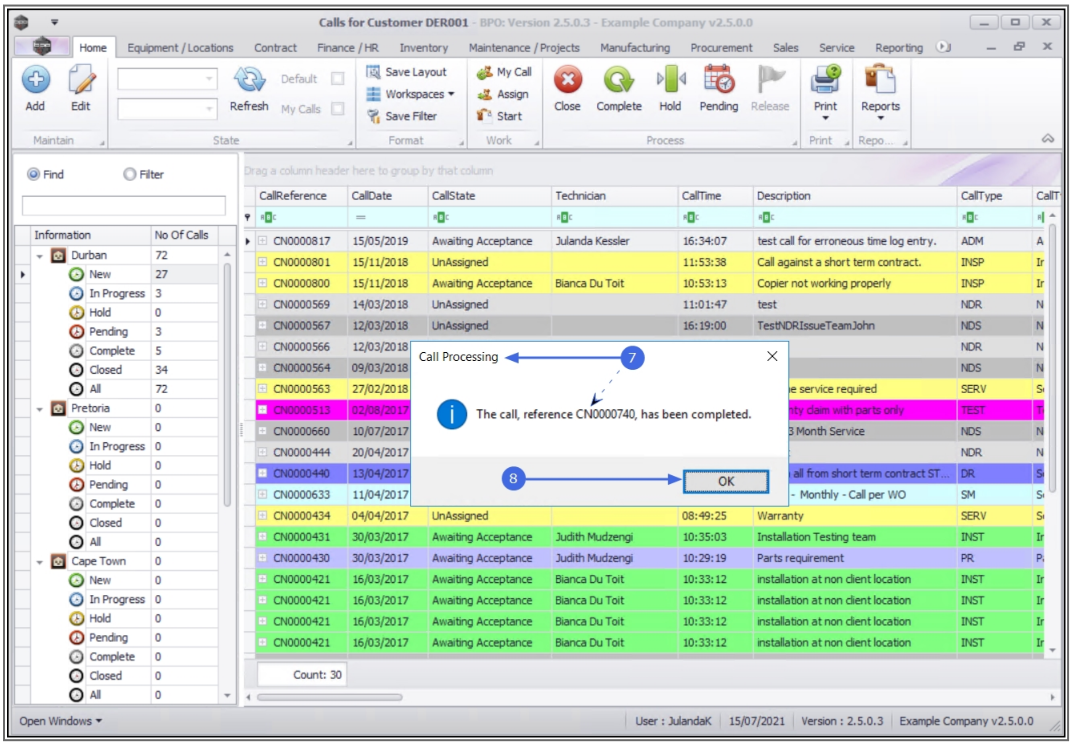


5. When you receive the ***Input Validation*** message to confirm;
    - ***Are you sure you want to complete this call, reference no. [****call ref number****]? Answer 'Yes' to complete the call.***
6. Click on ***Yes***.



7. Next you will receive the ***Call Processing*** message to confirm that;
    - ***The call, reference [****call ref number****], has been completed.***
8. Click on ***OK***.

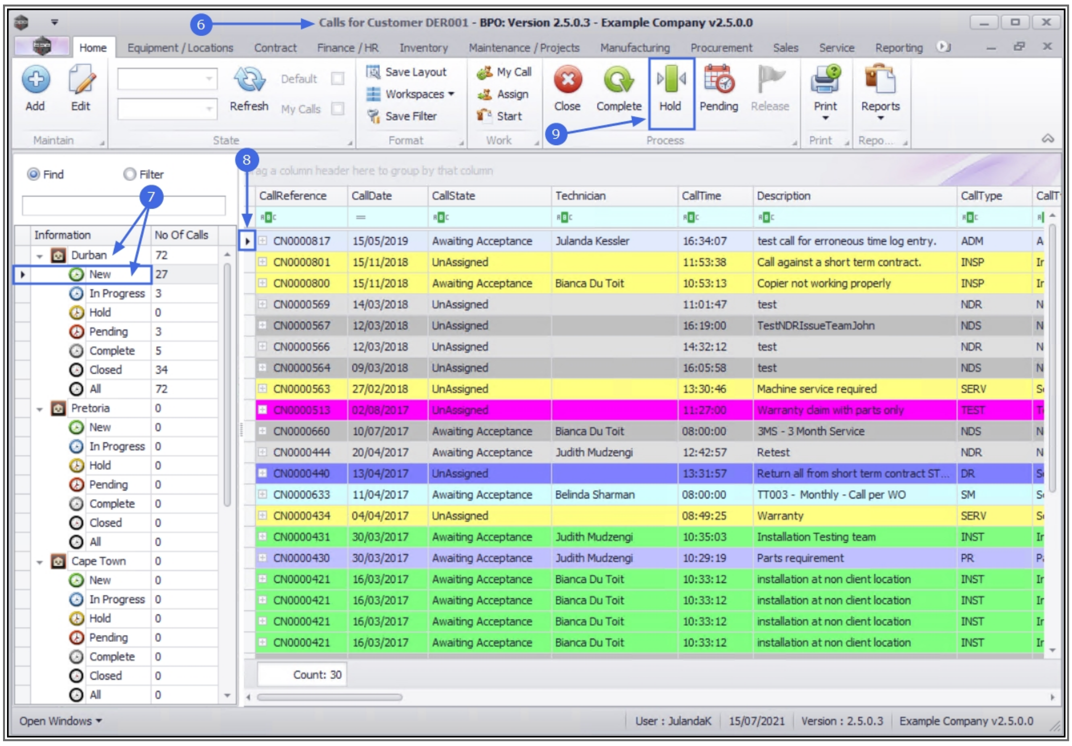
For a detailed handling of this topic refer to Calls - Complete a Call



PLACE CALL ON HOLD

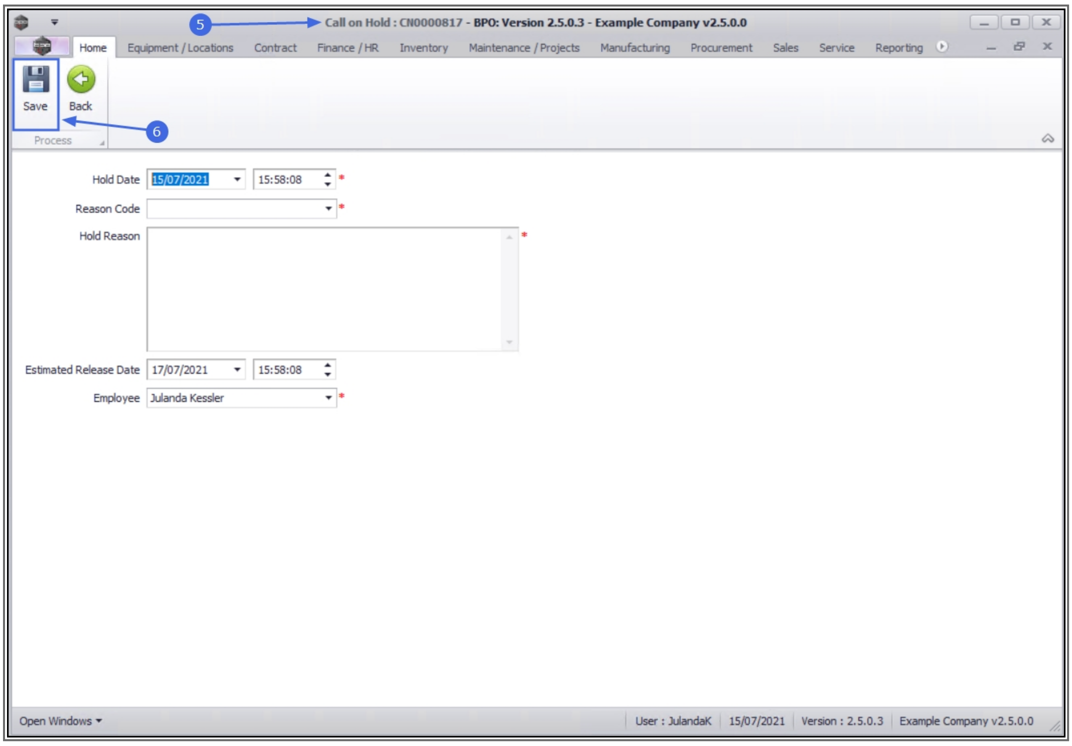
Placing a call on *Hold* will result in work being stopped to resolve a client/customer issue e.g there is no one available on site to allow a technician access to a location, or the client is awaiting approval from their finance department before a new part request can be fitted. The SLA Monitor will "pause" until the call is *Released from Hold*.

1. From the ***Calls for Customer [****customer code****]*** screen,
2. Select the ***Site***.
    - The example has ***Durban*** selected and the call status is ***New***.
3. Click on the ***row*** of the Call you wish to place on hold.
4. Click on ***Hold***.



5. The ***Call on Hold : [****call ref number****]*** screen will be displayed.
6. Complete the hold information for the call and click on ***Save***.

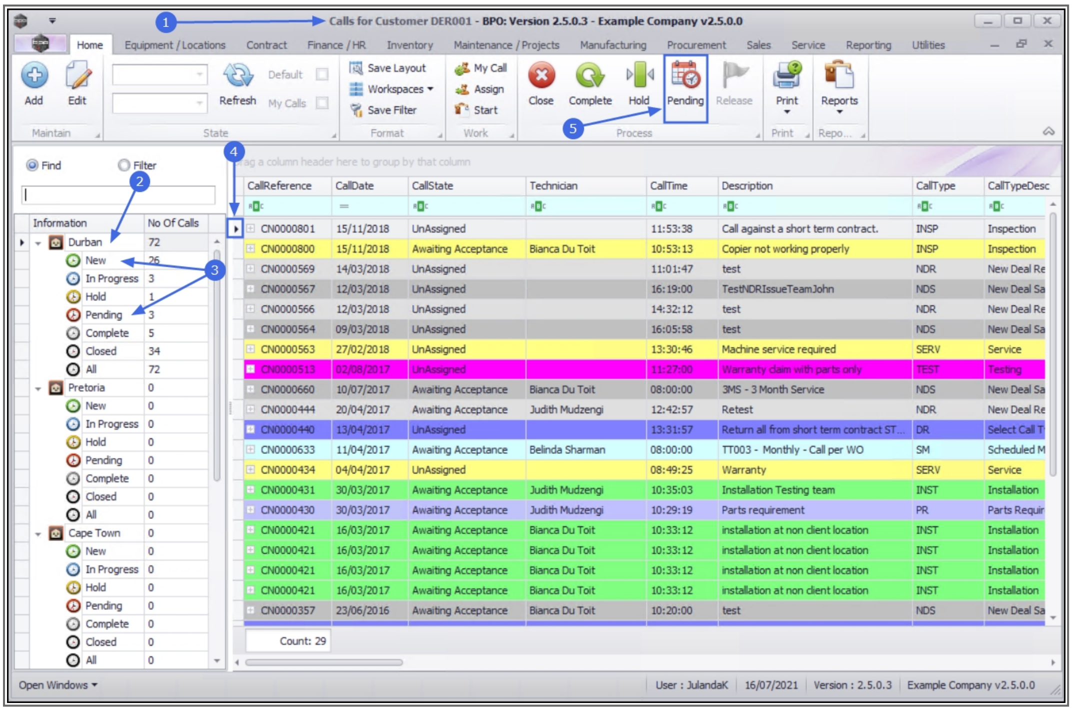
For a detailed handling of this topic refer to Calls - Place on Hold



MOVE TO PENDING

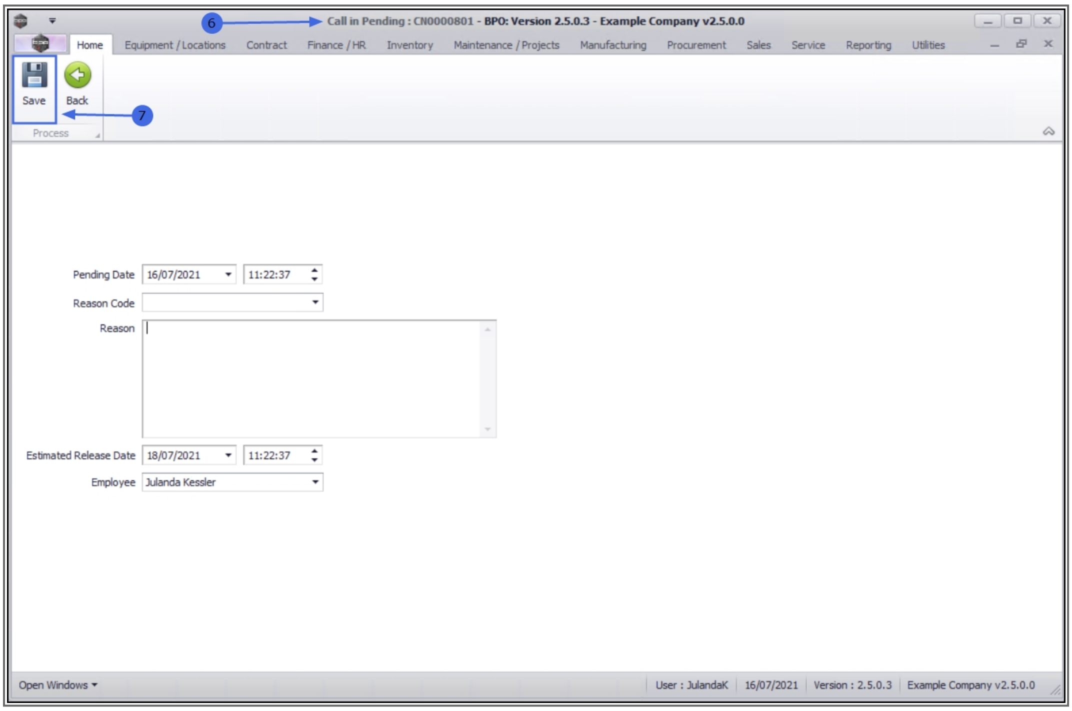
Placing a Call in a *Pending* status differs from placing a call on Hold. A call is placed in a pending status when work needs to be stopped to resolve a company issue, e.g. lack of stock to complete the work. The SLA Monitor will continue to run.

1. From the ***Calls for Customer [****customer code****]*** screen,
2. Select the ***Site***.
    - The example has ***Durban*** selected.
3. The ***Call Status*** must be in either the ***New*** or ***In Progress*** status.
4. Click on the ***row*** of the Call you wish to place in pending.
5. Click on ***Pending***



6. The ***Call in Pending : [****call ref number****]*** screen will be displayed.
7. Complete the pending information for the call and click on ***Save***.

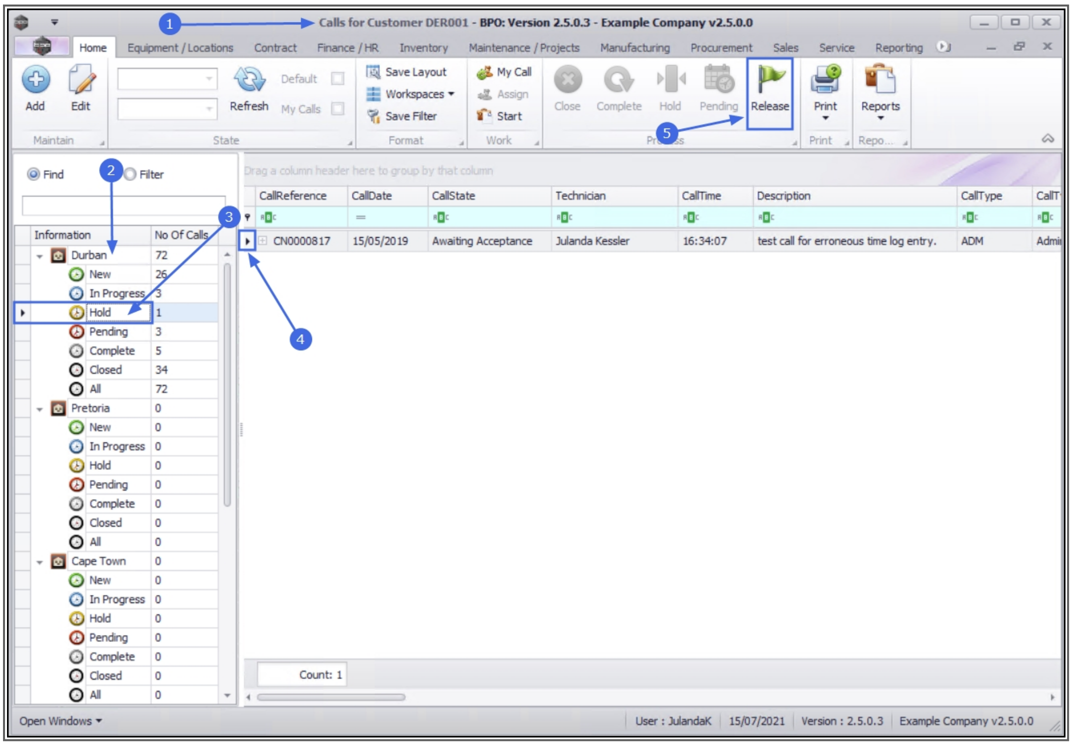
For a detailed handling of this topic refer to Calls - Move to Pending Status



RELEASE A CALL

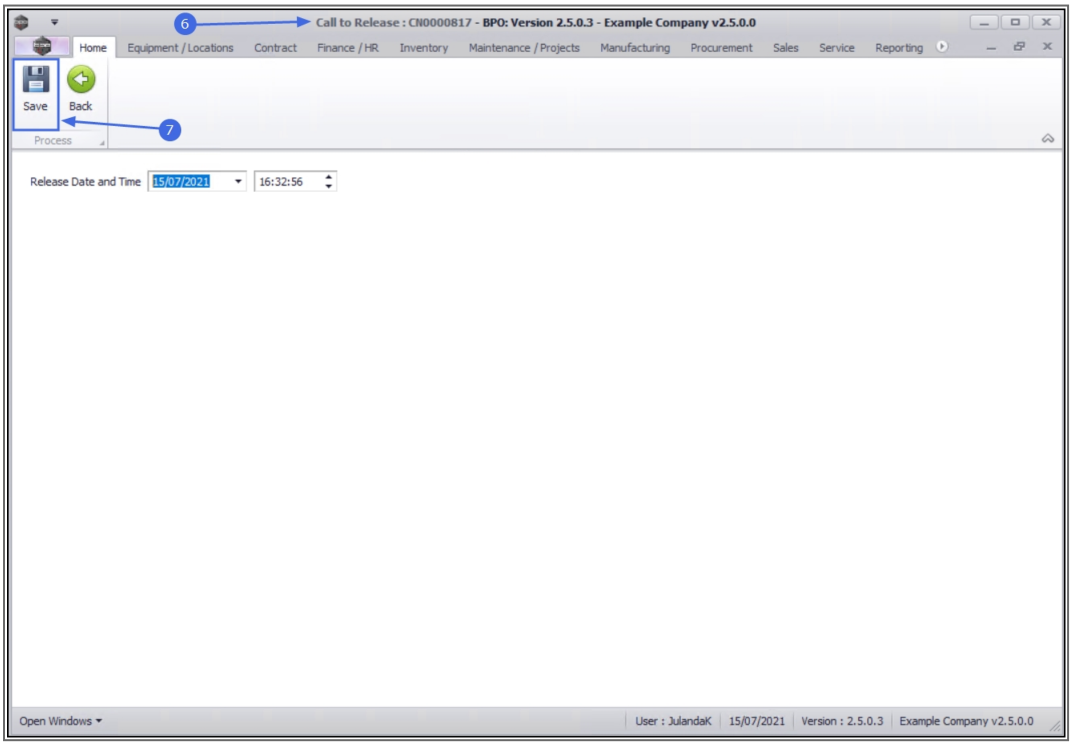
When a call is released, it will move back to the *New* status where it can be re-assigned. When the call is re-assigned, a new work order should be created.

1. From the ***Calls for Customer [customer code]*** screen,
2. Select the ***Site***.
    - The example has ***Durban*** selected.
3. Ensure that the ***Call Status*** has been set to ***Hold***.
4. Click on the ***row*** of the Call you wish to release from hold.
5. Click on ***Release***.



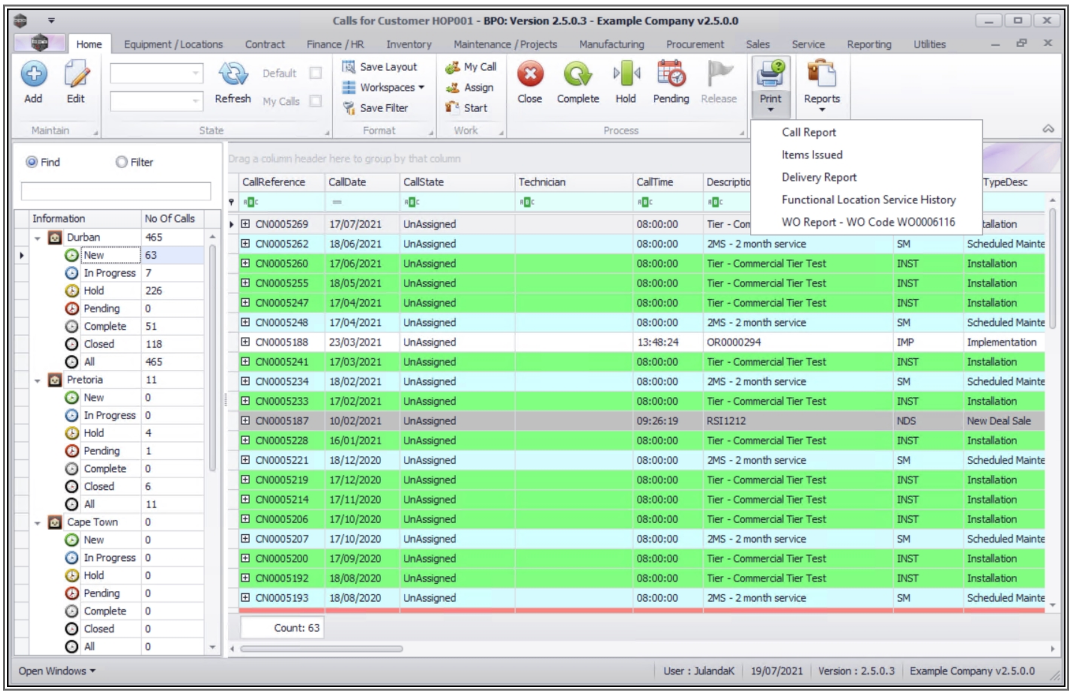
6. The ***Call to Release : [****call ref number****]*** screen will be displayed.
7. Complete the release information for the call and click on ***Save***.

For a detailed handling of this topic refer to Calls - Release a Call



PRINT PANEL

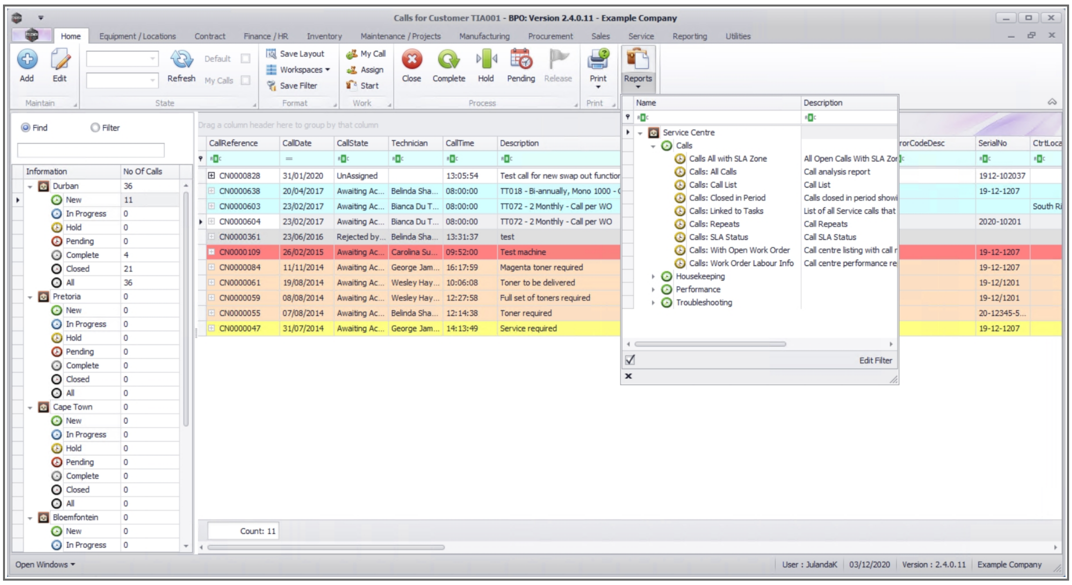
You can Print Call Report, Items Issued History Report, Delivery Report, Functional Location Service History Report, or a Work Order Report for the ***Call from the Calls for the Customer screen***, by selecting the ***Print*** button.



REPORTS PANEL

The ***Reports*** button allow you to print Reports regarding the Service Centre for:

1. **Calls**,
2. **Housekeeping**,
3. **Performance** and
4. **Troubleshooting** on Calls linked to the selected Customer.



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