

SERVICE

WORK MANAGEMENT – START WORK

Work that have been assigned to a Technician and who have time records linked to them, can be Ended from the Work Management screen.

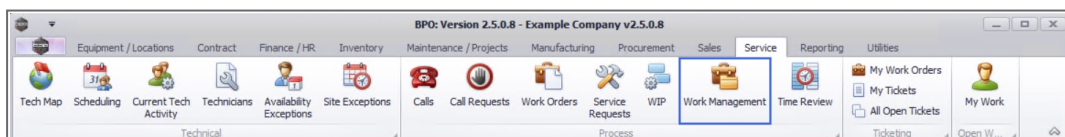
Only work orders that have time logged against them will be listed in the Work Management screen, which means that the work must have already started and time have been logged against the work order.

From the Work Management screen the work can be Ended on behalf of a Technician who omitted to do so, or where the Call Centre End Work on behalf of Technicians.



If a technician is using **Tech Connect**, then he can **Start Work** and End Work on the Call from his device.

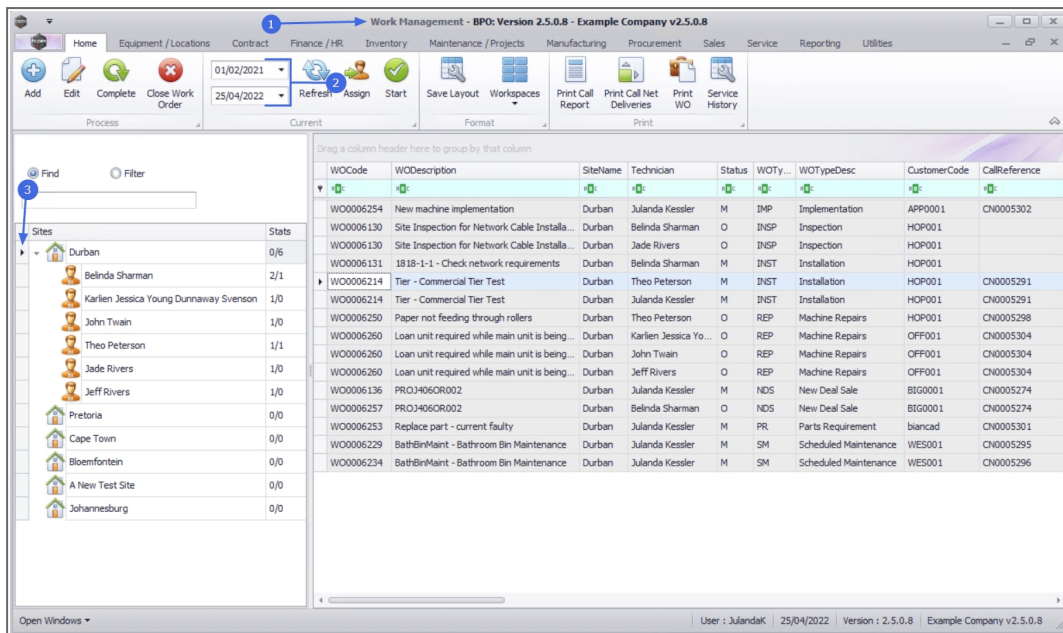
Ribbon Access: *Service > Work Management*



1. The **Work Management** screen will be displayed.
2. Select the **date range** that will contain the **work order** you wish to assign.
3. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.



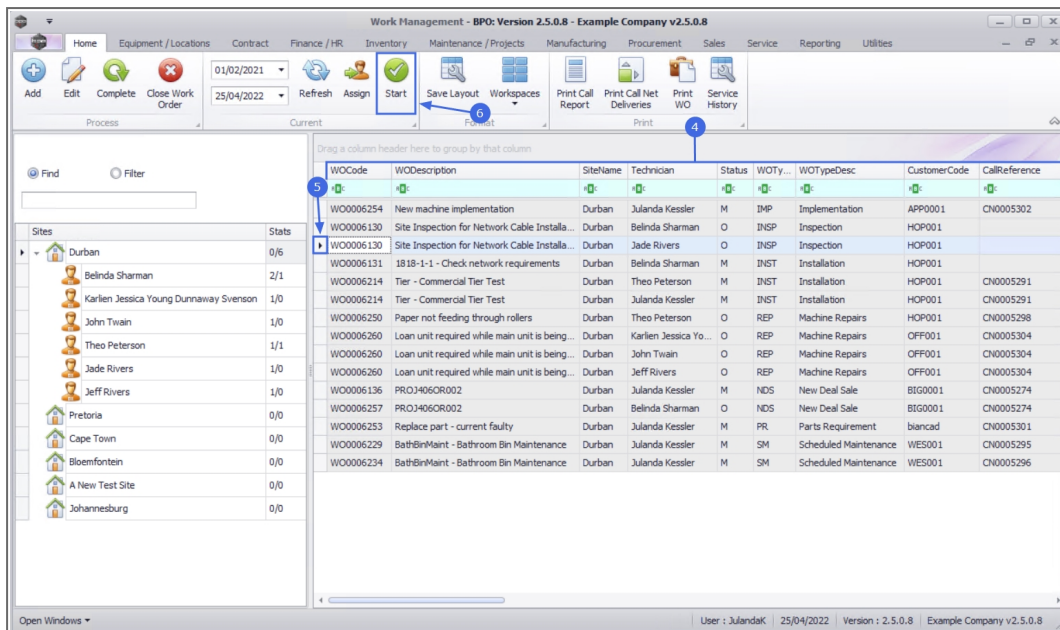
Click on the **Refresh** button to update the screen.



4. The **Work Orders** frame will be populated with all the work orders in the specified date range.
5. Click on the **row** of the **work order** you wish to start work on behalf of a Technician.
6. Click on **Start**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Start**.



7. " The Time Logging Express screen will be displayed." on page 3



Note that only the End Work button is available.

PRINT WORK ORDER REPORT

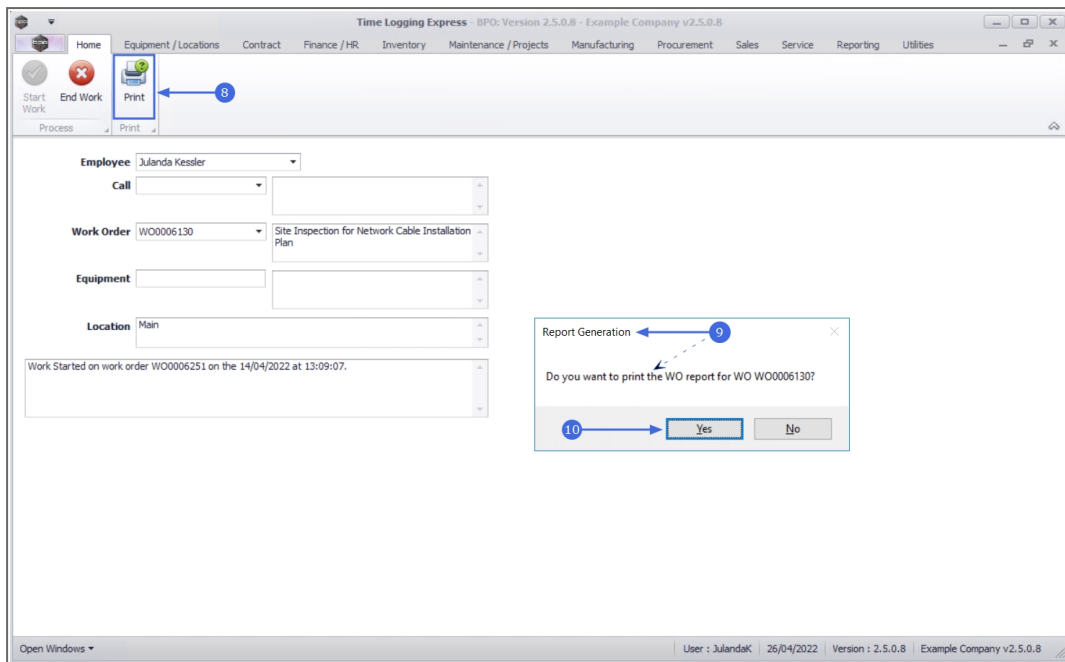
Once the Work Order has been selected, you can Print the Work Order Report.

8. Click on **Print**.

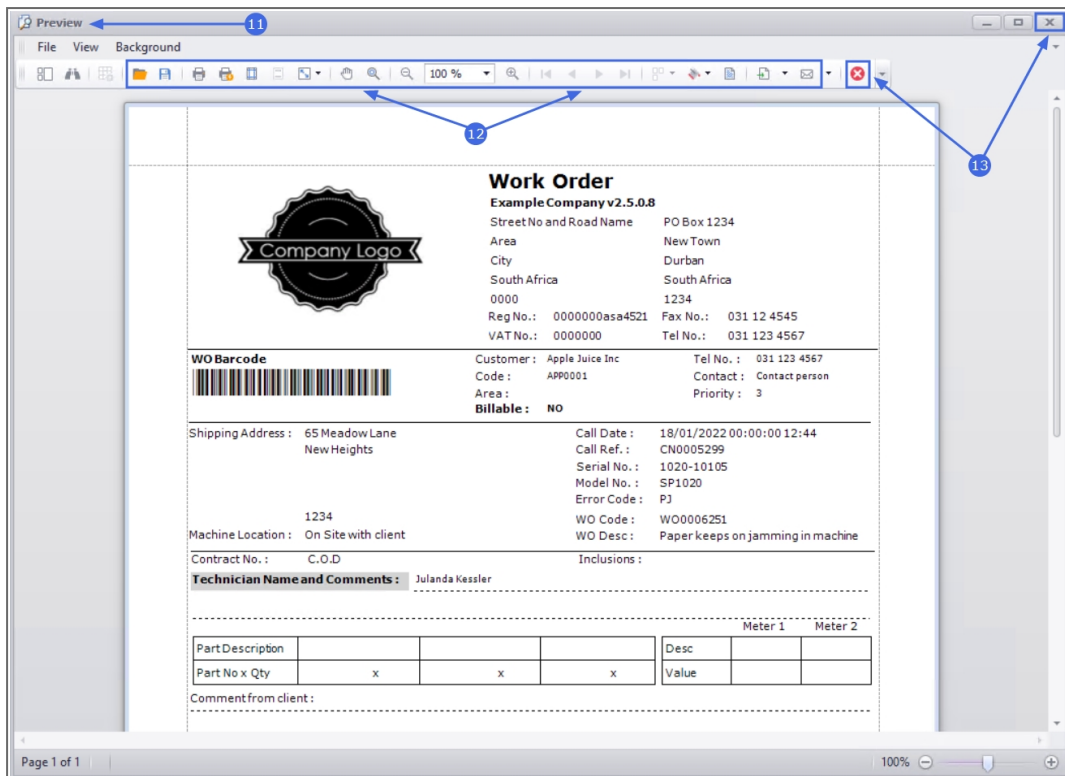
9. When you receive the **Report Generation** message to confirm;

- **Do you want to print the WO report for [work order number]?**

10. Click on **Yes**.



11. The Work Order will display in the Reports **Preview** screen.
12. From the preview screen you can make cosmetic changes to the document as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email** the report.
13. Click on **Close** to return to the **Time Logging Express** screen.



Work Order
Example Company v2.5.0.8

Street No and Road Name PO Box 1234
Area New Town
City Durban
South Africa South Africa
0000 1234
Reg No.: 0000000asa4521 Fax No.: 031 12 4545
VAT No.: 0000000 Tel No.: 031 123 4567

WO Barcode


Customer: Apple Juice Inc Tel No.: 031 123 4567
Code: APP0001 Contact: Contact person
Area: Priority: 3
Billable: NO

Shipping Address: 65 Meadow Lane
New Heights
1234
Machine Location: On Site with client
Call Date: 18/01/2022 00:00:00 12:44
Call Ref.: CN0005299
Serial No.: 1020-10105
Model No.: SP1020
Error Code: PJ
WO Code: WO0006251
WO Desc: Paper keeps on jamming in machine

Contract No.: C.O.D Inclusions:

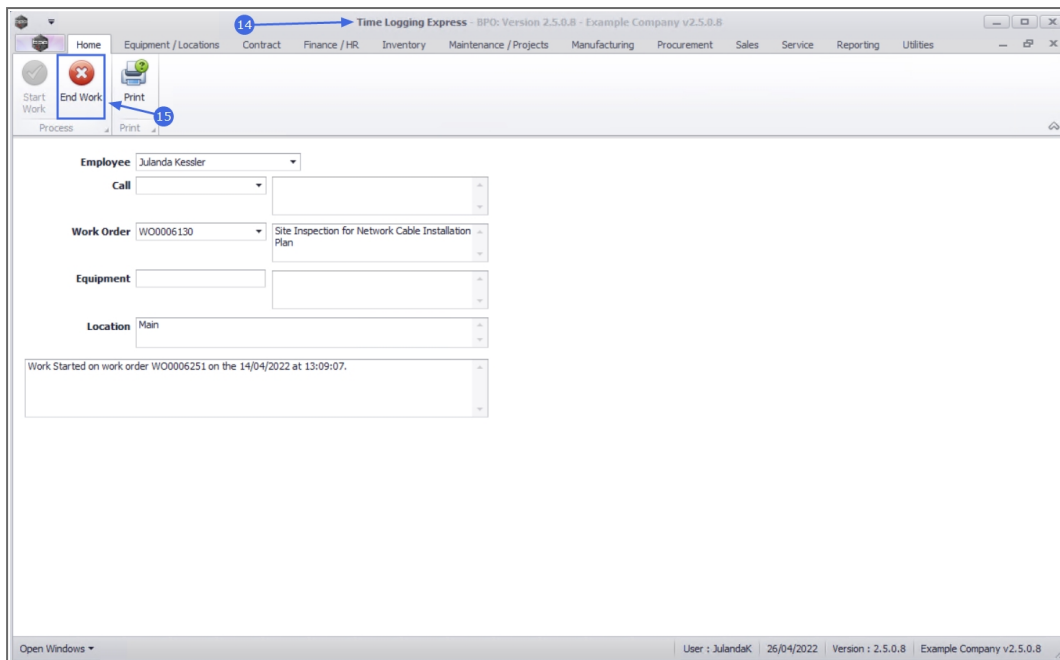
Technician Name and Comments: Julanda Kessler

PartDescription				Desc	Meter 1	Meter 2
Part No x Qty	x	x	x	Value		

Comment from client:

END WORK

14. From the *Time Logging Express* screen,
15. Click on *End Work*.



16. The **Close Open Work** frame will display.

17. Any previous work will be noted in the **Prior Work** and **Tech Comment** frames.

- Click on a row in the Prior Work frame. The **corresponding observation** from the Technician responsible for the work, will reflect in the **Tech Comment** frame, if a comment was recorded.
- The **corresponding rectification observation** from the Technician responsible for the previous call, will reflect in the Rectification Comment frame, if a comment was recorded.
- Use the **scroll bar** to scroll across the Prior Work frame to view more information related to previous calls, such as the previous work date(s), the previous Technician responsible for the work order, etc.



For a detailed handling of this topic refer to Calls - Start Work

16 → Close Open Work - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

End Work Save Layout

Process Format

Employee: Julanda Kessler

Call: CN0005299 Paper keeps on jamming in machine

Work Order: WO0006251 Paper keeps on jamming in machine

Equipment: 1020-10105 Copier

Location:

Work State: ☐ Unresolved Client ☐ Unresolved ☐ Resolved

Rectification Code:

Comments:

Work Started on work order WO0006251 on the 14/04/2022 at 13:09:07.

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Prior Work

Drag a column header here to group by that column

ParentRef	WOCCode	Description	Status	StatusDesc	Rectificatio...	WorkDate	TechComme...	Te
CN0005299	WO0006251	Paper keeps...	O	Open		01/01/1900		

Tech Comment

Rectification Comment

Open Windows

User : JulandaK 26/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

MNU.074.012

