

# SERVICE

## CALLS – LOG A CALL

**Note** that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility<sup>1</sup>. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

Calls are primarily created when customers phone in for service related requirements.

### Notes on Calls

- The **Call Listing** screen is used to log billable and non-billable **Service Calls** against contract and non-contract items, whether these are Assets or Locations.
- One or multiple [Work Orders](#) can exist within a call. Work Orders are likened to Job Cards or Work Instructions. [Work In Progress](#) transactions will be recorded against these work orders for the work that is required including Labour Time Booking, Parts, Expenses, Travel, Services and Sub Contract Work.
- Generally either an Asset or Location must be selected when logging the Call, and a Work Order is auto created when saving the Call. But this is dependant on your Company's system configuration. Refer to Specialized Call Configuration for more details about processing outside the standard processing.

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<sup>1</sup>BPO2 v2.5.1.3 or higher

- [New Deal Sale](#) and [New Deal Rental](#) processing will also process through the call centre screen to enforce the Work In Progress transactions for installation of Sale or Rental Items.
- Calls are [Assigned](#) to employees (such as Technicians or Drivers) in order to perform the work required. An employee must be set as a [Technician](#) in order to be available for assignment. Refer to TechConnect for more information related to our mobile application that Technicians can use out in the field.
- Once work has been completed Work In Progress transactions can then be [Invoiced](#) if required, dependant on the scenario.



If the **Company**, **Contact**, or **Address** details for the customer have **changed**, then you can quickly update the details via the relevant **Ellipse** button in the call screen. Refer to [Calls - Edit Buttons](#)



You cannot log a call for a Customer on Hold. If you select a customer that is on hold, you will be asked if you would like to log a [Call Request](#) instead.



An optional telephone number can be added to the call, which will be for your reference, when logging or editing the call. Refer to "[Call Details](#)" on [page 4](#)

## CALL LOGGING – DETAIL SELECTION METHODS

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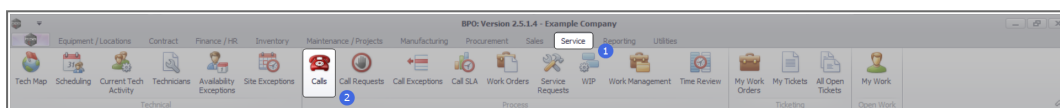
- Call details can be selected based on what information is given when the client phones in.
- For example, if a call is logged for a serialised item and the serial number is known, this can be selected first. Associated header information will auto populate, which makes the call logging

process faster.

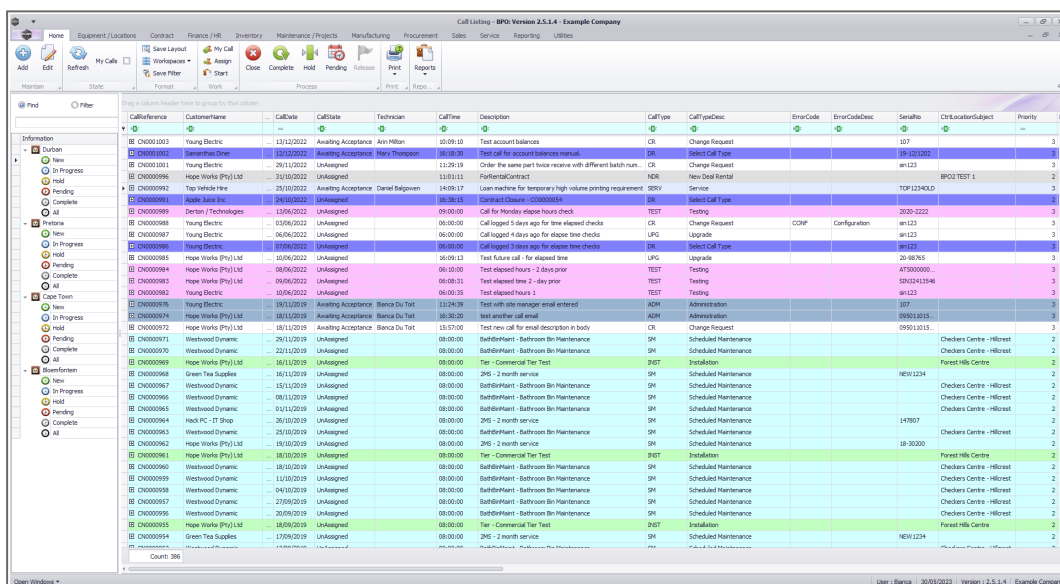
- In this manual, we will first look at the standard call logging process, and then include a few tips for [other call detail selection methods](#), such as first selecting the Serial Number or Location, Customer, Contact, or Telephone Number.

## LOG A CALL

### Ribbon Select **Service > Calls**



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



| CallReference | CustomerName          | CallDate   | CallState           | Technician     | CallTime | Description                                                 | CallType | CallTypeDesc          | ErrorCode | ErrorCodeDesc | SerialNo     | CallLocationSubject         | Priority | Max |
|---------------|-----------------------|------------|---------------------|----------------|----------|-------------------------------------------------------------|----------|-----------------------|-----------|---------------|--------------|-----------------------------|----------|-----|
| BN CH0001003  | Young Electric        | 12/12/2022 | Awaiting Acceptance | Jon Hilborn    | 02:09:10 | Test account balances                                       | CR       | Change Request        |           |               | 187          |                             | 3        |     |
| BN CH0001001  | Young Electric        | 26/11/2022 | Unassigned          | Nery Thompson  | 06:38:30 | Test call for account balances manual                       | SR       | Select Call Type      |           |               | 187-12/12/22 |                             | 3        |     |
| BN CH0000996  | Hope Works (Pty) Ltd  | 20/10/2022 | Unassigned          |                | 11:29:19 | Order the same part twice receive with different batch num. | CR       | Change Request        |           |               | an123        |                             | 3        |     |
| BN CH0000992  | Top Vehicle Hire      | 20/10/2022 | Awaiting Acceptance | Daniel Redgum  | 14:05:17 | Loan machine for temporary high volume printing requirement | SRV      | Service               |           |               | TOP1234567   |                             | 3        |     |
| BN CH0000991  | Askle Juss Inc        | 24/10/2022 | Unassigned          |                | 05:36:15 | Contact Closure - C0000054                                  | DK       | Select Call Type      |           |               |              |                             | 3        |     |
| BN CH0000989  | Deshon / Technologies | 13/04/2022 | Unassigned          |                | 09:00:00 | Call for Monday elapse hours check                          | TEST     | Testing               |           |               | 2020-2222    |                             | 3        |     |
| BN CH0000988  | Young Electric        | 12/06/2022 | Unassigned          |                | 08:00:00 | Call logged 5 days ago for time elapsed checks              | CR       | Change Request        | CONF      | Configuration | an123        |                             | 3        |     |
| BN CH0000987  | Young Electric        | 06/06/2022 | Unassigned          |                | 06:00:00 | Call logged 4 days ago for elapse time checks               | UPG      | Upgrade               |           |               | an123        |                             | 3        |     |
| BN CH0000986  | Young Electric        | 07/06/2022 | Unassigned          |                | 06:00:00 | Call logged 5 days ago for elapse time checks               | DK       | Select Call Type      |           |               | an123        |                             | 3        |     |
| BN CH0000985  | Hope Works (Pty) Ltd  | 10/06/2022 | Unassigned          |                | 06:00:13 | Test future call - for elapsed time                         | UPG      | Upgrade               |           |               | 20-9895      |                             | 3        |     |
| BN CH0000984  | Hope Works (Pty) Ltd  | 06/06/2022 | Unassigned          |                | 06:00:00 | Test elapsed time - 2 days prior                            | TEST     | Testing               |           |               | 47300000     |                             | 3        |     |
| BN CH0000983  | Hope Works (Pty) Ltd  | 06/06/2022 | Unassigned          |                | 06:08:31 | Test elapsed time 2 - day prior                             | TEST     | Testing               |           |               | 5202413546   |                             | 3        |     |
| BN CH0000982  | Young Electric        | 10/06/2022 | Unassigned          |                | 06:00:35 | Test elapsed time 1                                         | TEST     | Testing               |           |               | an123        |                             | 3        |     |
| BN CH0000976  | Young Electric        | 16/11/2019 | Awaiting Acceptance | Bianca Du Toit | 13:24:36 | Test with site manager email entered                        | ADM      | Administration        |           |               | 107          |                             | 3        |     |
| BN CH0000974  | Hope Works (Pty) Ltd  | 16/11/2019 | Awaiting Acceptance | Bianca Du Toit | 16:30:20 | Test another call email                                     | ADM      | Administration        |           |               | 055012015    |                             | 3        |     |
| BN CH0000972  | Hope Works (Pty) Ltd  | 16/11/2019 | Awaiting Acceptance | Bianca Du Toit | 15:07:00 | Test new call for email description in body                 | CR       | Change Request        |           |               | 055012015    |                             | 3        |     |
| BN CH0000971  | Westwood Dynamic      | 26/11/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000970  | Westwood Dynamic      | 22/11/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000969  | Hope Works (Pty) Ltd  | 16/11/2019 | Unassigned          |                | 08:00:00 | Tier - Commercial Tier Test                                 | INVT     | Installation          |           |               |              | Forest Hills Centre         | 2        |     |
| BN CH0000968  | Green Tea Supplies    | 16/11/2019 | Unassigned          |                | 08:00:00 | 2MS - 2 month service                                       | SM       | Scheduled Maintenance |           |               | NEW1234      |                             | 2        |     |
| BN CH0000967  | Westwood Dynamic      | 15/11/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000966  | Westwood Dynamic      | 08/11/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000965  | Westwood Dynamic      | 01/11/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000964  | Mac PC - IT Shop      | 26/10/2019 | Unassigned          |                | 08:00:00 | 2MS - 2 month service                                       | SM       | Scheduled Maintenance |           |               | 147807       |                             | 2        |     |
| BN CH0000963  | Westwood Dynamic      | 26/10/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000962  | Hope Works (Pty) Ltd  | 19/10/2019 | Unassigned          |                | 08:00:00 | 2MS - 2 month service                                       | SM       | Scheduled Maintenance |           |               | 18-30300     |                             | 2        |     |
| BN CH0000961  | Hope Works (Pty) Ltd  | 18/10/2019 | Unassigned          |                | 08:00:00 | Tier - Commercial Tier Test                                 | INVT     | Installation          |           |               |              | Forest Hills Centre         | 2        |     |
| BN CH0000960  | Westwood Dynamic      | 18/10/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000959  | Westwood Dynamic      | 11/10/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000958  | Westwood Dynamic      | 04/10/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000957  | Westwood Dynamic      | 27/09/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000956  | Westwood Dynamic      | 20/09/2019 | Unassigned          |                | 08:00:00 | SubfloorHart - Bathroom Bin Maintenance                     | SM       | Scheduled Maintenance |           |               |              | Checkers Centre - Hillcrest | 2        |     |
| BN CH0000955  | Hope Works (Pty) Ltd  | 18/09/2019 | Unassigned          |                | 08:00:00 | Tier - Commercial Tier Test                                 | INVT     | Installation          |           |               |              | Forest Hills Centre         | 2        |     |
| BN CH0000954  | Green Tea Supplies    | 17/09/2019 | Unassigned          |                | 08:00:00 | 2MS - 2 month service                                       | SM       | Scheduled Maintenance |           |               | NEW1234      |                             | 2        |     |

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

Call Listing - BPO Version 2.5.1.4 - Example Company

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

My Call Add Edit Refresh Save Layout Workspaces My Call Assign Save Filter Start Close Complete Hold Pending Release Print Reports

Find Filter

Drop a selected filter here to group by that column

| CallReference | CustomerName          | CallDate   | CallTime            | Technician      | Description | CallType | CallTypeDesc                                                | ErrorCode | ErrorCodeDesc | SerialNo   | ChkLocationSubject          | Priority |
|---------------|-----------------------|------------|---------------------|-----------------|-------------|----------|-------------------------------------------------------------|-----------|---------------|------------|-----------------------------|----------|
| BT CH0001003  | Young Electric        | 13/03/2023 | Awaiting Acceptance | Ash Wilson      | 10:09:10    | CR       | Change Request                                              |           |               |            |                             | 3        |
| BT CH0001002  | Silverstone Drive     | 12/03/2023 | Awaiting Acceptance | Nery Thompson   | 08:38:28    | DP       | Select Call Type                                            |           |               | 09-10/100  |                             | 3        |
| BT CH0001001  | Young Electric        | 26/11/2022 | Unassigned          |                 | 11:26:19    | CR       | Change Request                                              |           |               | an123      | BPO2 TEST 1                 | 3        |
| BT CH0000996  | Hope Works (Pty) Ltd  | 21/03/2023 | Unassigned          |                 | 13:03:11    | TCM      | New Desk Rental                                             |           |               |            |                             | 3        |
| BT CH0000992  | Top Video Hire        | 20/03/2023 | Awaiting Acceptance | Daniel Redgrave | 14:05:17    | SSV      | Loan machine for temporary high volume printing requirement |           |               | TOP1234567 |                             | 3        |
| BT CH0000991  | Askle Juss Inc        | 24/03/2023 | Unassigned          |                 | 05:08:15    | DP       | Select Call Type                                            |           |               |            |                             | 3        |
| BT CH0000989  | Denton / Technologies | 13/04/2022 | Unassigned          |                 | 09:00:00    | TEST     | Testing                                                     |           |               | 2020-2222  |                             | 3        |
| BT CH0000988  | Young Electric        | 10/04/2022 | Unassigned          |                 | 08:00:00    | CR       | Change Request                                              | CONF      | Configuration | an123      |                             | 3        |
| BT CH0000987  | Young Electric        | 06/04/2022 | Unassigned          |                 | 06:00:00    | UPG      | Upgrade                                                     |           |               | an123      |                             | 3        |
| BT CH0000986  | Young Electric        | 03/04/2022 | Unassigned          |                 | 06:00:00    | DP       | Select Call Type                                            |           |               | an123      |                             | 3        |
| BT CH0000985  | Hope Works (Pty) Ltd  | 10/04/2022 | Unassigned          |                 | 10:09:13    | UPG      | Upgrade                                                     |           |               | 20-00000   |                             | 3        |
| BT CH0000984  | Hope Works (Pty) Ltd  | 08/04/2022 | Unassigned          |                 | 06:00:00    | TEST     | Testing                                                     |           |               | 47300000   |                             | 3        |
| BT CH0000983  | Hope Works (Pty) Ltd  | 06/04/2022 | Unassigned          |                 | 06:08:31    | TEST     | Testing                                                     |           |               | SH02413546 |                             | 3        |
| BT CH0000982  | Young Electric        | 18/04/2022 | Unassigned          |                 | 06:00:30    | TEST     | Testing                                                     |           |               | an123      |                             | 3        |
| BT CH0000981  | Young Electric        | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit  | 13:24:36    | ADM      | Administration                                              |           |               | 107        |                             | 3        |
| BT CH0000974  | Hope Works (Pty) Ltd  | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit  | 16:30:20    | ADM      | Administration                                              |           |               | 095012513  |                             | 3        |
| BT CH0000972  | Hope Works (Pty) Ltd  | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit  | 15:07:00    | CR       | Change Request                                              |           |               | 09501315   |                             | 3        |
| BT CH0000971  | Westwood Dynamic      | 20/11/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000970  | Westwood Dynamic      | 22/11/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000969  | Hope Works (Pty) Ltd  | 16/11/2019 | Unassigned          |                 | 08:00:00    | INVT     | Installation                                                |           |               |            | Forest Hills Centre         | 2        |
| BT CH0000968  | Green Tea Supplies    | 16/11/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               | NEW1234    |                             | 2        |
| BT CH0000967  | Westwood Dynamic      | 15/11/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000966  | Westwood Dynamic      | 08/11/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000965  | Westwood Dynamic      | 01/11/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000964  | Hack PC / IT Shop     | 26/10/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               | 147807     |                             | 2        |
| BT CH0000963  | Westwood Dynamic      | 20/10/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000962  | Hope Works (Pty) Ltd  | 19/10/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000961  | Hope Works (Pty) Ltd  | 18/10/2019 | Unassigned          |                 | 08:00:00    | INVT     | Installation                                                |           |               |            | Forest Hills Centre         | 2        |
| BT CH0000960  | Westwood Dynamic      | 18/10/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000959  | Westwood Dynamic      | 11/10/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000958  | Westwood Dynamic      | 04/10/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000957  | Westwood Dynamic      | 27/09/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000956  | Westwood Dynamic      | 20/09/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               |            | Checkers Centre - Hillcrest | 2        |
| BT CH0000955  | Hope Works (Pty) Ltd  | 18/09/2019 | Unassigned          |                 | 08:00:00    | INVT     | Installation                                                |           |               |            | Forest Hills Centre         | 2        |
| BT CH0000954  | Green Tea Supplies    | 17/09/2019 | Unassigned          |                 | 08:00:00    | SM       | Scheduled Maintenance                                       |           |               | NEW1234    |                             | 2        |

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- Click on the **Add** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

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

My Call Add Edit Refresh Save Layout Workspaces My Call Assign Save Filter Start Close Complete Hold Pending Release Print Reports

Information

Drop a selected filter here to group by that column

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

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

Call maintenance - BPO Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Refresh Save Layout Workspaces Print Note

Information

Drop a selected filter here to group by that column

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

## CALL DETAILS

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**Customer:** Search for and select the customer:

- The **yellow** colouring of the field indicates that you can search for the customer, using one of two methods.



### **Search Method 1:**

- Type in a part of the Customer Name in the Customer field and press **Enter**.
- The example has "cafe" typed in the field. When pressing Enter, the system will locate all the Customers that has "cafe" as part of the name.
  - If the system locates the Customer, then the screen will be populated with the customer information.
  - If more than one Customer exists, then the **Select a customer for this call screen** will display a list of the Customer's that have "cafe" forming a part of the name.
  - Skip to Select Customer below



### **Search Method 2:**

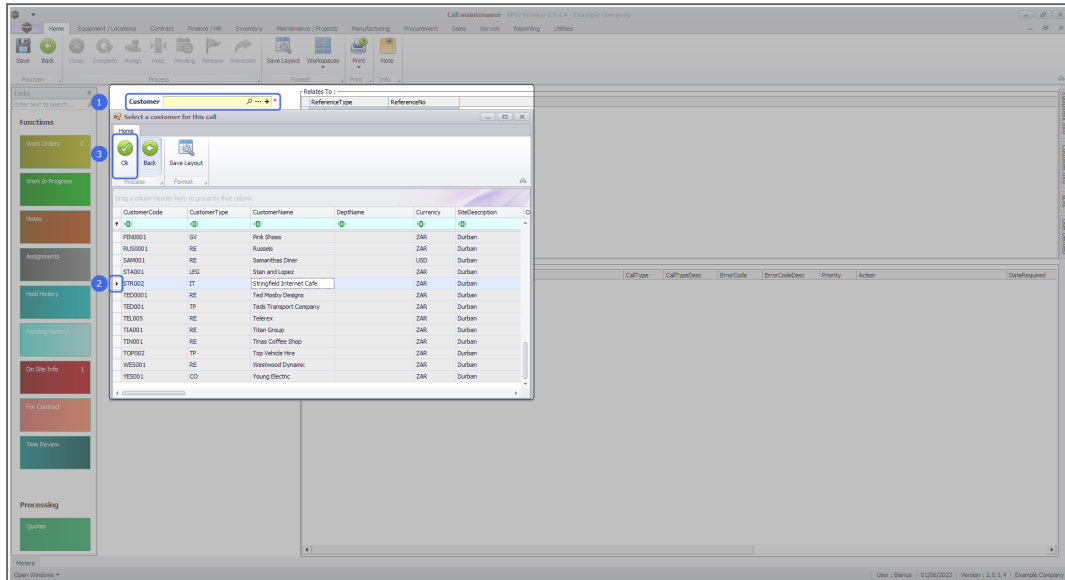
- Click on the **search** button in the customer field.
- The **Select a customer for this call** screen will display, listing all Active Customers.
- Click on the **row** of the **customer** you wish to **log a call** for.
- Click on **OK**.



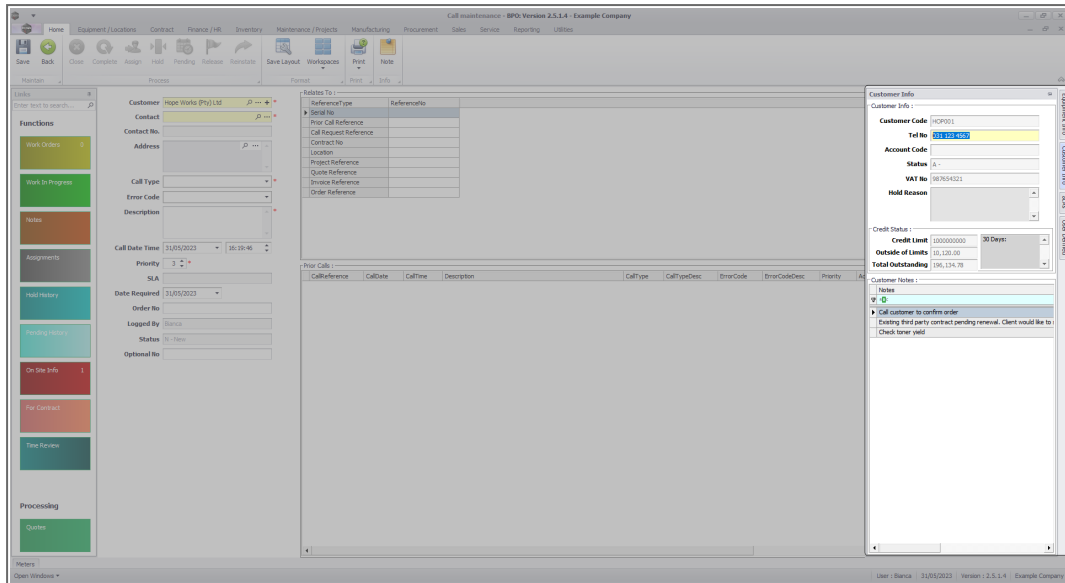


## Select Customer:

- Click on the **row** of the **customer** you wish to **log a call** for.
- Click on **OK**.



- The **Customer Info** docking panel will **expand** to display view only details for the selected customer. This is helpful for customer and credit status checks, as well as any prior call notes.
- When done, click anywhere outside this dock panel to hide it.



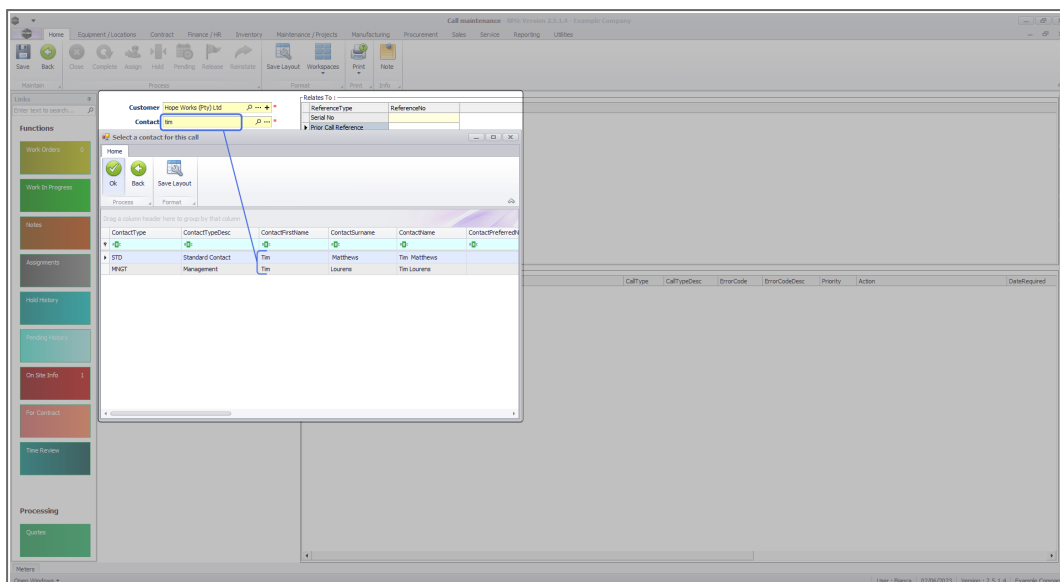
## Contact: Search for and select the contact:

- The yellow colouring of the field indicates that you can search for the customer, using one of two methods.



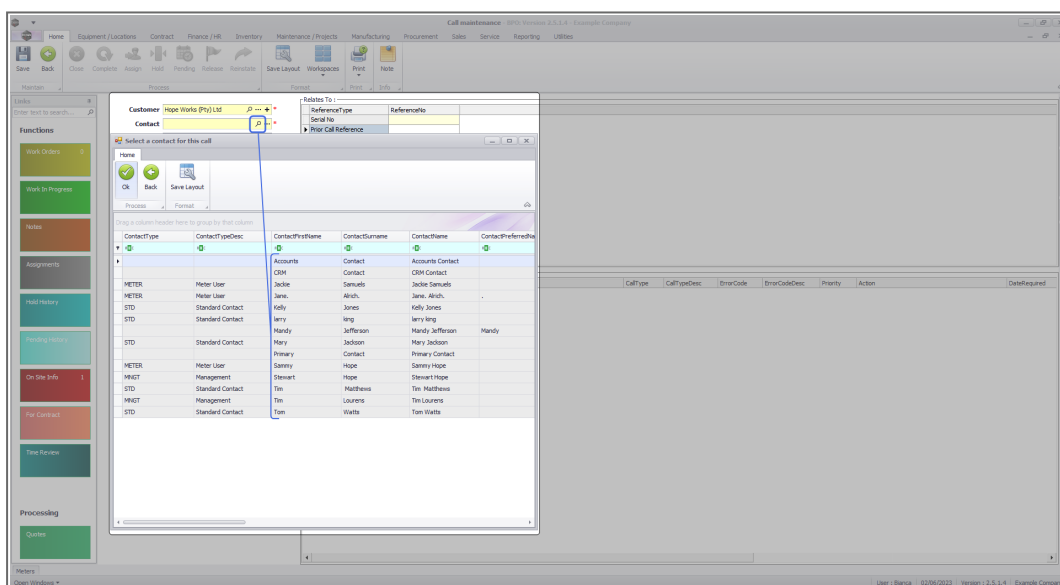
### Search Method 1:

- Type in a part of the Contact Name in the Contact field and press Enter.
- The example has "Tim" typed in the field. When pressing Enter, the system will locate all the Contacts that has "Tim" as part of the name.
  - If the system locates the Contact, then the field will be populated with the contact name.
  - If more than one Contact exists, then the Select a contact for this call screen will display a list of the Contact's that have "Tim" forming a part of the name.
  - Skip to [Select Contact](#) below.



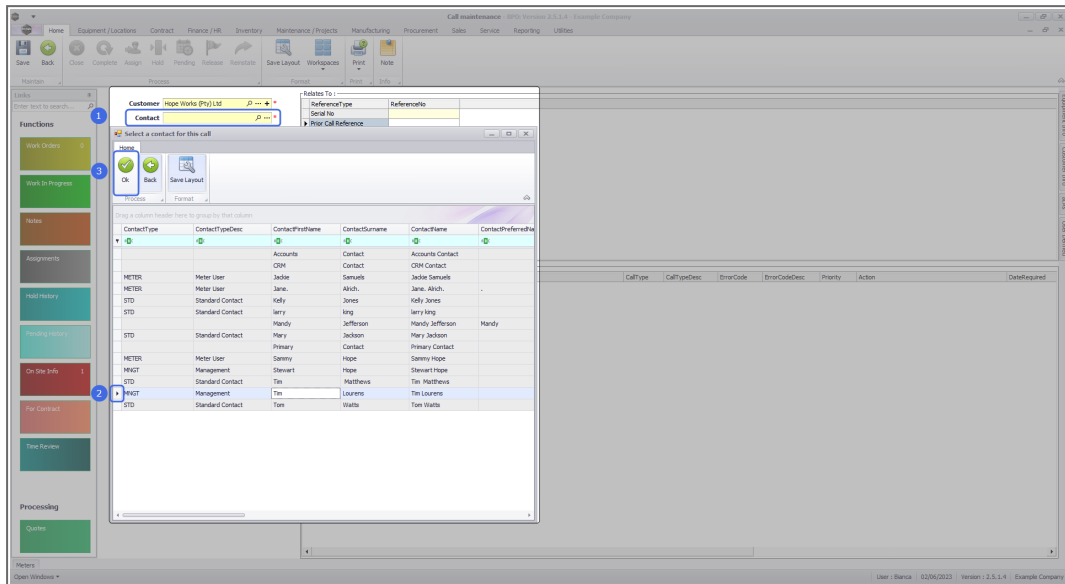
## Search Method 2:

- Click on the search button in the contact field.
- The Select a contact for this call screen will display, listing all Active Contacts for the Customer previously selected.



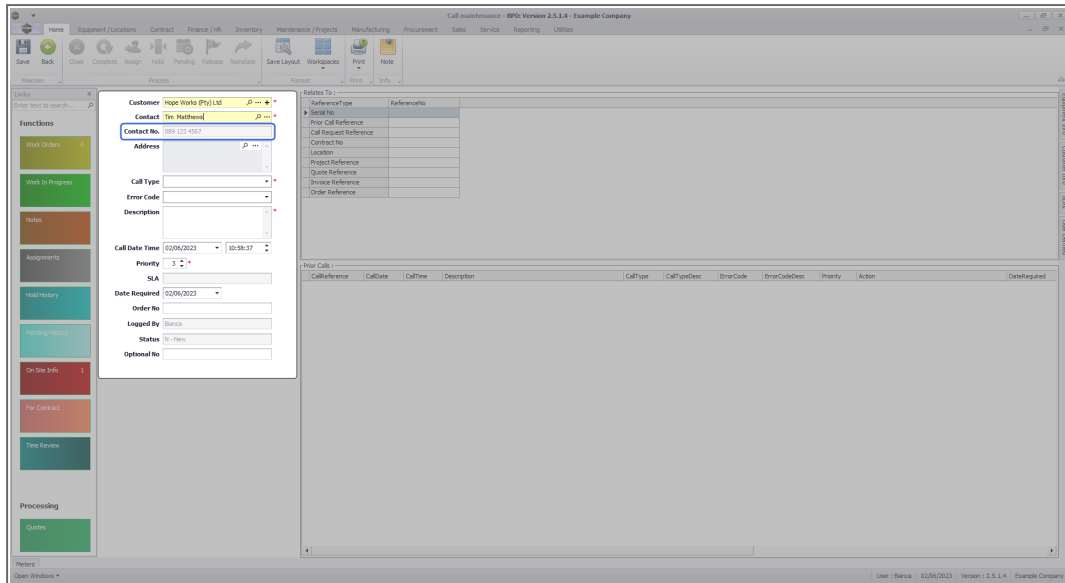
## Select Contact:

- Click on the row of the contact you wish to link to the call.
- Click on OK.

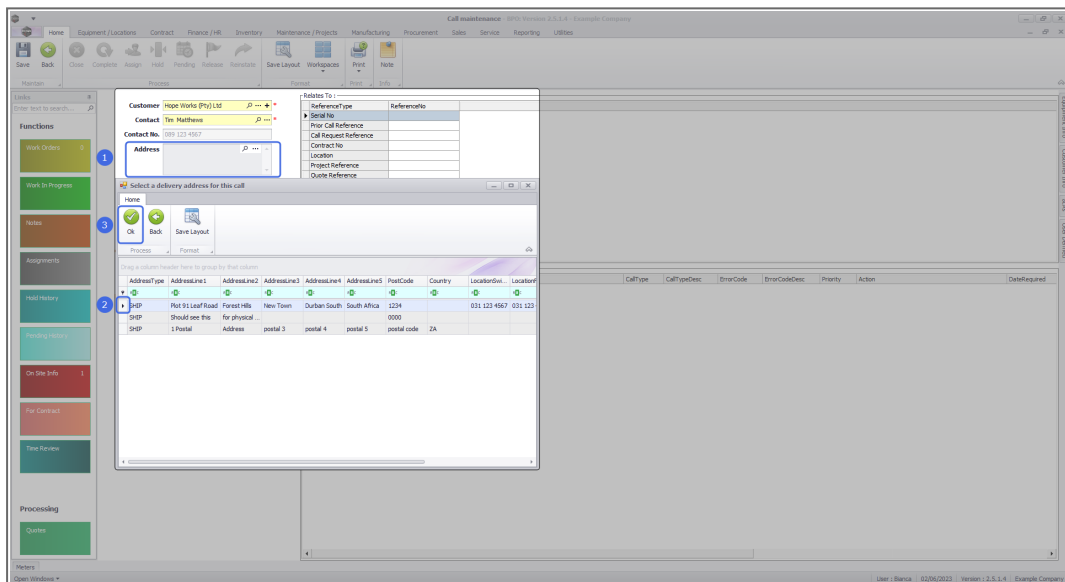


If you have searched for the contact person, and they do not appear on the list, then you can **add** a new contact from the **Call Maintenance** screen. This contact should be added as a **Standard Contact**. Refer to [Calls - Add New Contact](#).

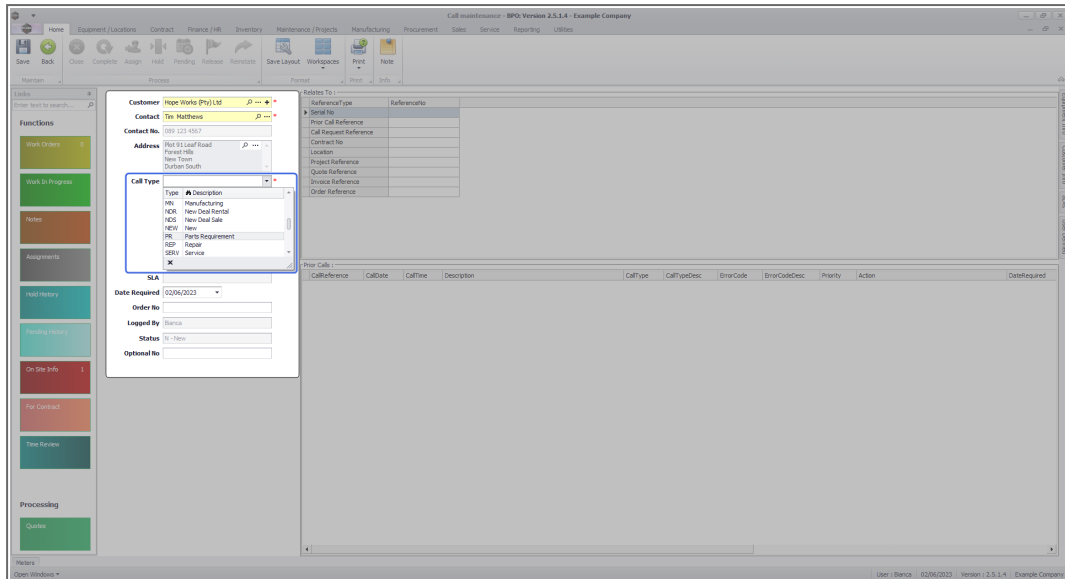
- **Contact No:** When the contact is selected, this field is auto populated with the contact's telephone number if configured on the contact.



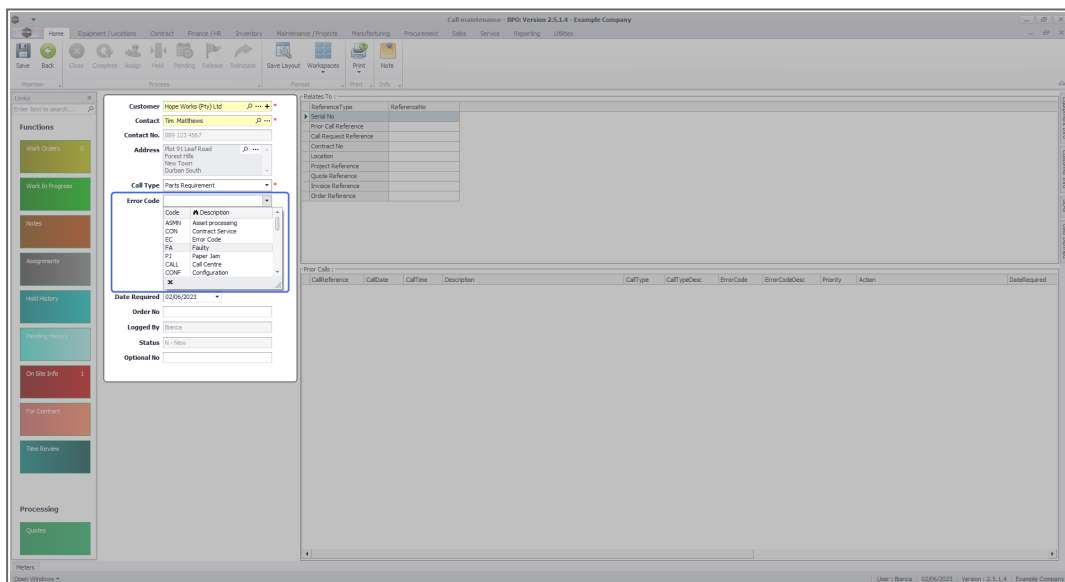
- **Address:** Search for and select the address.



- **Call Type:** Select the required call type from the drop down list.  
(Refer to [Static Data - Call Types](#) if the call type required has not yet been configured.)



- **Error Code:** Click on the down **arrow** to display the error code list.
- Select the **error code type** as quoted by the customer. This field is not a mandatory field and may not be set up, depending on system requirements. (Refer to [Static Data - Call Error Codes](#) for setting up error codes if not configured.)



- **Description:** Click in the text box to type in a description for the work required.
- **Call Date Time:** This field will display the current date and time by default, and should not be changed.
- **Priority<sup>1</sup>:** Click in the field to type in or use the arrow indicators to select the call priority.
- **SLA:<sup>2</sup>** This field cannot be updated, as the service level agreement information will populate for the customer.
- **Date Required:** The date will default to the current date. Click to type in or use the down **arrow** to select an alternative date using the calendar function.
- **Order No:** Type in the Purchase Order number raised by the customer, if required.



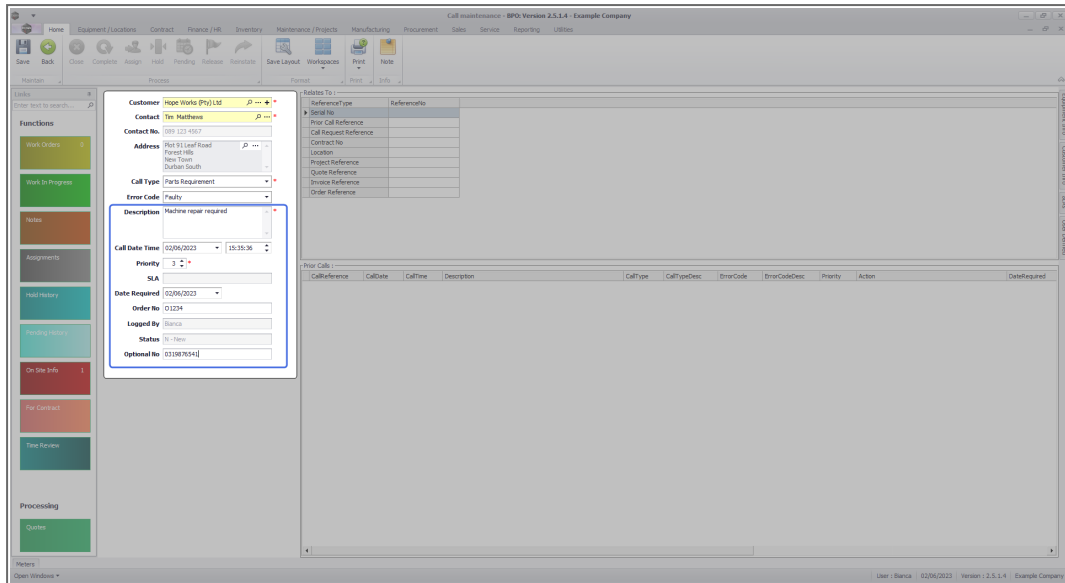
**Note** that this field could be mandatory based on the customer contract configuration i.e. if it is specified in the contract to include the Order Number then this will become a mandatory field for that particular customer.

- **Logged By:** This field will be populated with the name of the person currently logging the call.
- **Status:** The call status field will be set to **N - New** by default.
- **Optional No:** This field can be used for an additional reference number that the customer may wish to keep on record.

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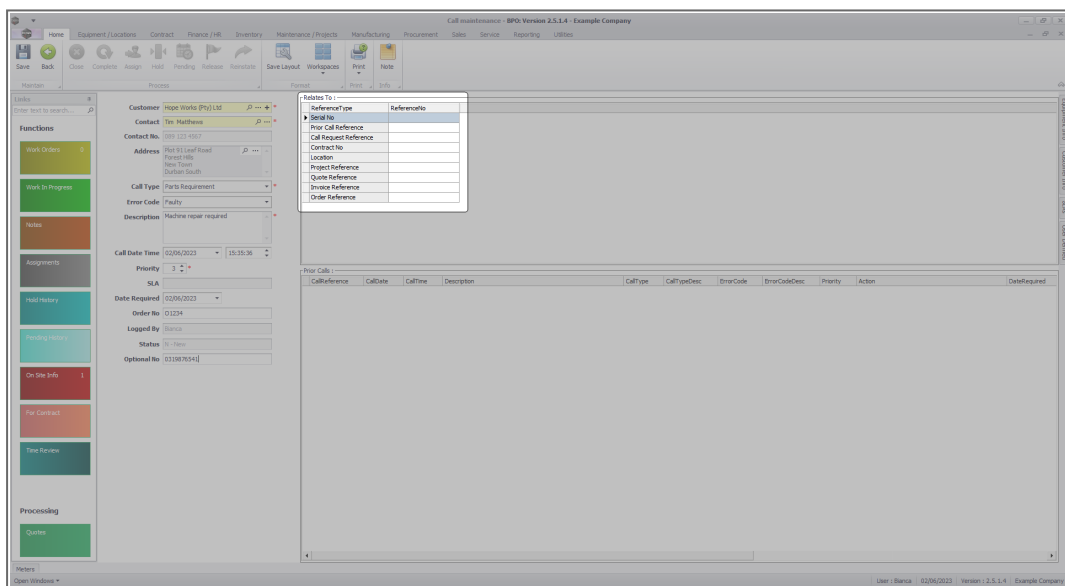
<sup>1</sup>1 = Most Important 5 = Least Important

<sup>2</sup>This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).



## RELATED REFERENCES

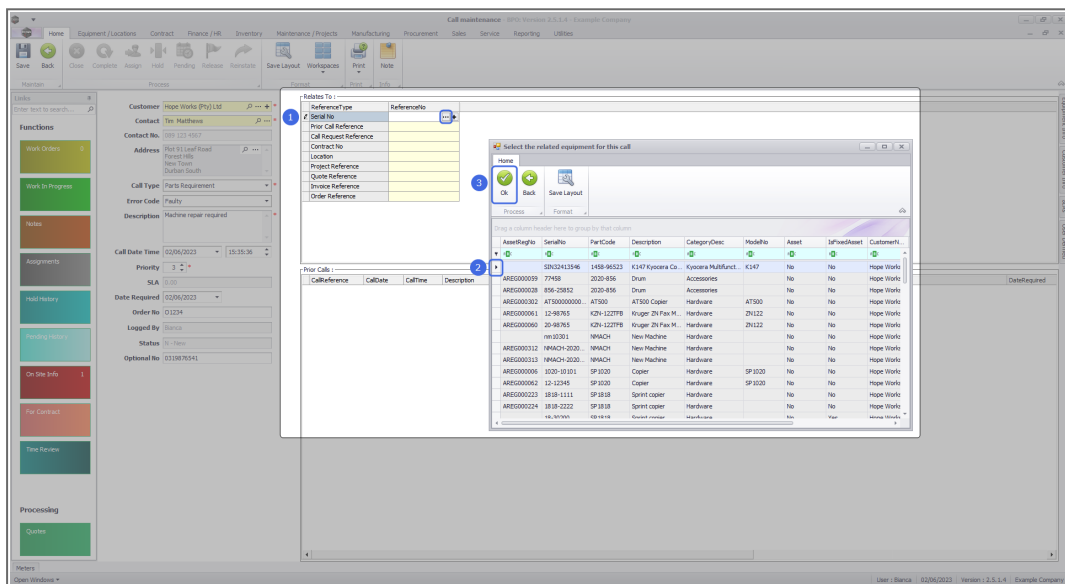
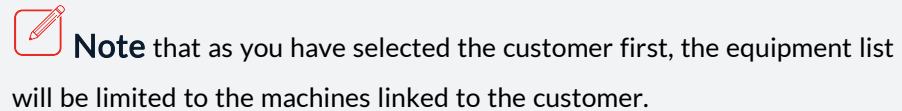
The **Related To** frame holds related references, such as the Serial Number or Location, originating Call Request Number, Contract Number, etc.



For Standard call log processing, we will select either a Serial Number or Location.

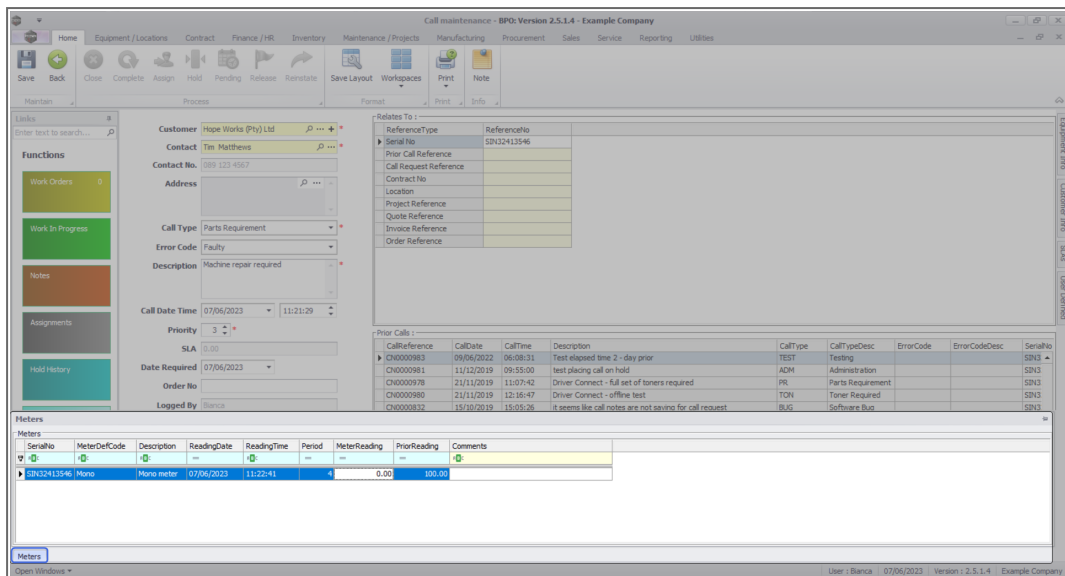
## Serial Number

- Click in the **Serial No.** field to display the **ellipsis** button.
- Click on the ellipsis button and select the serial number you wish to log the call against.
- Click on **OK**.



## Meters

- If the asset has meters linked, then the Meters frame will automatically expand to display the Meter reading data grid.



Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: Hope Works (Pty) Ltd  
Contact: Tim Matthews  
Contact No: 089 123 4567  
Address: [Empty]  
Call Type: Parts Requirement  
Error Code: Faulty  
Description: Machine repair required  
Call Date Time: 07/06/2023 11:21:29  
Priority: 3  
SIA: 0.00  
Date Required: 07/06/2023  
Order No: [Empty]  
Logged By: [Empty]

Relates To:

| ReferenceType          | ReferenceNo |
|------------------------|-------------|
| Serial No              | SNJ2413546  |
| Prior Call Reference   |             |
| Call Request Reference |             |
| Contract No            |             |
| Location               |             |
| Project Reference      |             |
| Quote Reference        |             |
| Invoice Reference      |             |
| Order Reference        |             |

Prior Calls:

| CallReference | CallDate   | CallTime | Description                                              | CallType | CallTypeDesc      | ErrorCode | ErrorCodeDesc | SerialNo |
|---------------|------------|----------|----------------------------------------------------------|----------|-------------------|-----------|---------------|----------|
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior                          | TEST     | Testing           |           |               | SNJ3     |
| CH0000981     | 11/12/2019 | 09:55:00 | test placing call on hold                                | ADM      | Administration    |           |               | SNJ3     |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - Full set of toners required             | PR       | Parts Requirement |           |               | SNJ3     |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline test                            | TDR      | Toner Required    |           |               | SNJ3     |
| CH0000932     | 15/10/2019 | 15:05:26 | it seems like call notes are not saving for call request | BUG      | Software Bug      |           |               | SNJ3     |

Meters:

| SerialNo   | MeterDefCode | Description | ReadingDate | ReadingTime | Period | MeterReading | PriorReading | Comments |
|------------|--------------|-------------|-------------|-------------|--------|--------------|--------------|----------|
| SNJ2413546 | Mono         | Mono meter  | 07/06/2023  | 11:22:41    | 4      | 0.00         | 100.00       |          |

User: Bianca 07/06/2023 Version: 2.5.1.4 Example Company

- Type in the meter reading(s), if required.
  - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that are yield controlled.
  - If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.
- You can also add a comment for each meter reading.
- When the meter reading has been updated, **hide** the frame by clicking outside the frame.

Call maintenance - BPO: Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reallocate Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links: Enter text to search...

Functions: Work Orders 0, Work In Progress, Notes, Assignments, Hold History

Customer: Hope Works (Pty) Ltd  
Contact: Tim Matthews  
Contact No: 089 123 4567  
Address: [Empty]  
Call Type: Parts Requirement  
Error Code: Faulty  
Description: Machine repair required  
Call Date Time: 07/06/2023 11:21:29  
Priority: 3  
SLA: 0.00  
Date Required: 07/06/2023  
Order No: [Empty]  
Logged By: Bianca

Relates To:

| ReferenceType          | ReferenceNo |
|------------------------|-------------|
| Serial No              | SNJ2413546  |
| Prior Call Reference   |             |
| Call Request Reference |             |
| Contract No            |             |
| Location               |             |
| Project Reference      |             |
| Quote Reference        |             |
| Invoice Reference      |             |
| Order Reference        |             |

Prior Calls:

| CallReference | CallDate   | CallTime | Description                                              | CallType | CallTypeDesc      | ErrorCode | ErrorCodeDesc | SerialNo |
|---------------|------------|----------|----------------------------------------------------------|----------|-------------------|-----------|---------------|----------|
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior                          | TEST     | Testing           |           |               | SNJ3     |
| CH0000981     | 11/12/2019 | 09:55:00 | test placing call on hold                                | ADM      | Administration    |           |               | SNJ3     |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - Full set of toners required             | PR       | Parts Requirement |           |               | SNJ3     |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline test                            | TON      | Toner Required    |           |               | SNJ3     |
| CH0000932     | 15/10/2019 | 15:05:26 | it seems like call notes are not saving for call request | BUG      | Software Bug      |           |               | SNJ3     |

Meters:

| SerialNo   | MeterDefCode | Description | ReadingDate | ReadingTime | Period | MeterReading | PriorReading | Comments                                     |
|------------|--------------|-------------|-------------|-------------|--------|--------------|--------------|----------------------------------------------|
| SNJ2413546 | Mono         | Mono meter  | 07/06/2023  | 11:22:41    | 4      | 150.00       | 100.00       | Reading provided by Tim when call was logged |

User: Bianca 07/06/2023 Version: 2.5.1.4 Example Company

Call maintenance - BPO: Version 2.5.1.4 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reallocate Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links: Enter text to search...

Functions: Work Orders 0, Work In Progress, Notes, Assignments, Hold History

Customer: Hope Works (Pty) Ltd  
Contact: Tim Matthews  
Contact No: 089 123 4567  
Address: [Empty]  
Call Type: Parts Requirement  
Error Code: Faulty  
Description: Machine repair required  
Call Date Time: 07/06/2023 11:21:29  
Priority: 3  
SLA: 0.00  
Date Required: 07/06/2023  
Order No: [Empty]  
Logged By: Bianca

Relates To:

| ReferenceType          | ReferenceNo |
|------------------------|-------------|
| Serial No              | SNJ2413546  |
| Prior Call Reference   |             |
| Call Request Reference |             |
| Contract No            |             |
| Location               |             |
| Project Reference      |             |
| Quote Reference        |             |
| Invoice Reference      |             |
| Order Reference        |             |

Prior Calls:

| CallReference | CallDate   | CallTime | Description                                              | CallType | CallTypeDesc      | ErrorCode | ErrorCodeDesc | SerialNo |
|---------------|------------|----------|----------------------------------------------------------|----------|-------------------|-----------|---------------|----------|
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior                          | TEST     | Testing           |           |               | SNJ3     |
| CH0000981     | 11/12/2019 | 09:55:00 | test placing call on hold                                | ADM      | Administration    |           |               | SNJ3     |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - Full set of toners required             | PR       | Parts Requirement |           |               | SNJ3     |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline test                            | TON      | Toner Required    |           |               | SNJ3     |
| CH0000932     | 15/10/2019 | 15:05:26 | it seems like call notes are not saving for call request | BUG      | Software Bug      |           |               | SNJ3     |

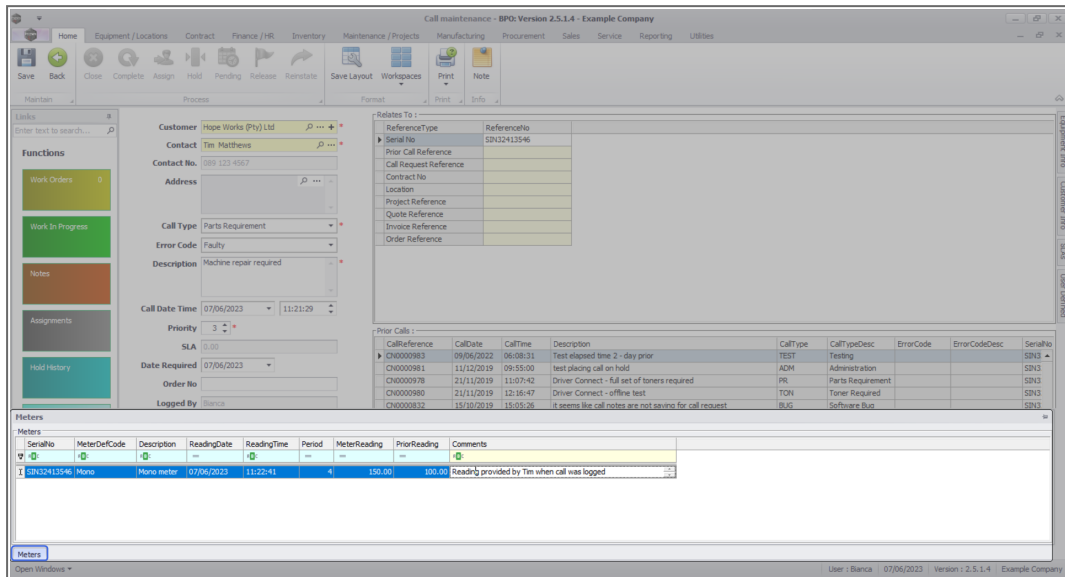
Meters:

| SerialNo   | MeterDefCode | Description | ReadingDate | ReadingTime | Period | MeterReading | PriorReading | Comments |
|------------|--------------|-------------|-------------|-------------|--------|--------------|--------------|----------|
| SNJ2413546 | Mono         | Mono meter  | 07/06/2023  | 11:22:41    | 4      | 0.00         | 100.00       |          |

User: Bianca 07/06/2023 Version: 2.5.1.4 Example Company

- Type in the meter reading(s), if required.
  - It is good practice to get the meter reading when logging a call, and is mandatory for requesting parts that are yield controlled.
  - If this is a service related call, then you may only get the readings when the technician returns from the call, at which point you can edit and update the readings.

- You can also add a comment for each meter reading.
- When the meter reading has been updated, **hide** the frame by clicking outside the frame.



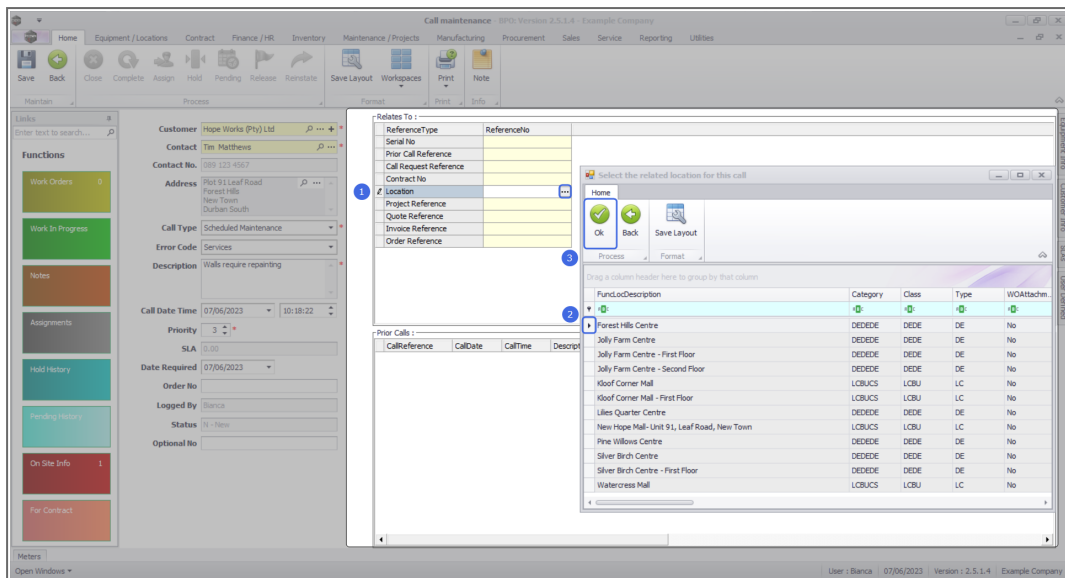
- Jump ahead to [Contract Number](#).

## Location

- Click in the **Location** field to display the **ellipsis** button.
- Click on the ellipsis button and select the Location you wish to log the call against.
- Click on **OK**.

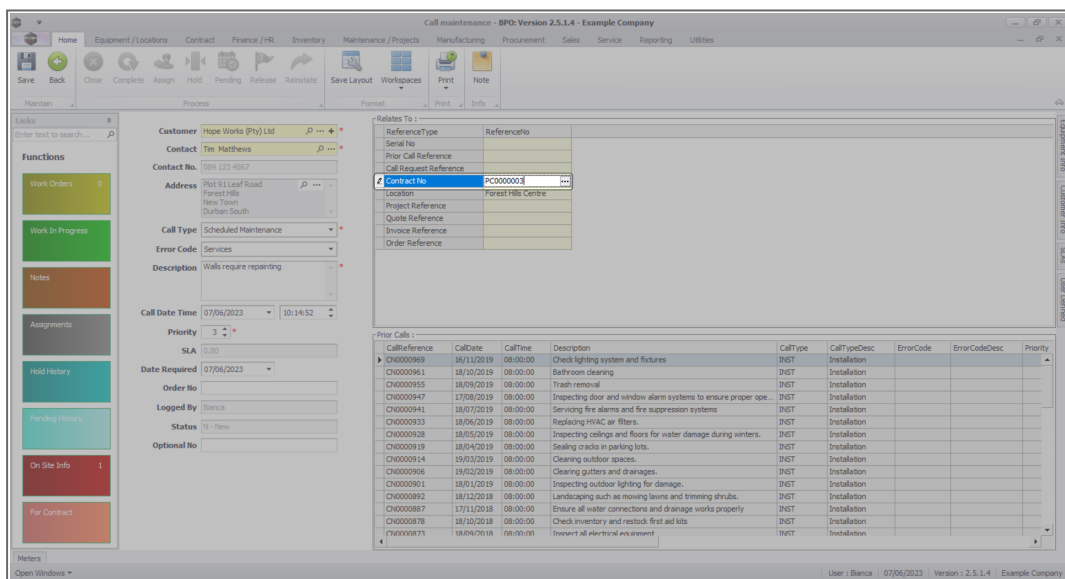


**Note** that as you have selected the customer first, the location list will be limited to the locations linked to the customer.



## Contract Number

- If the Serial Number or Location you have selected is on contract, then the contract number field will auto populate with the contract number.



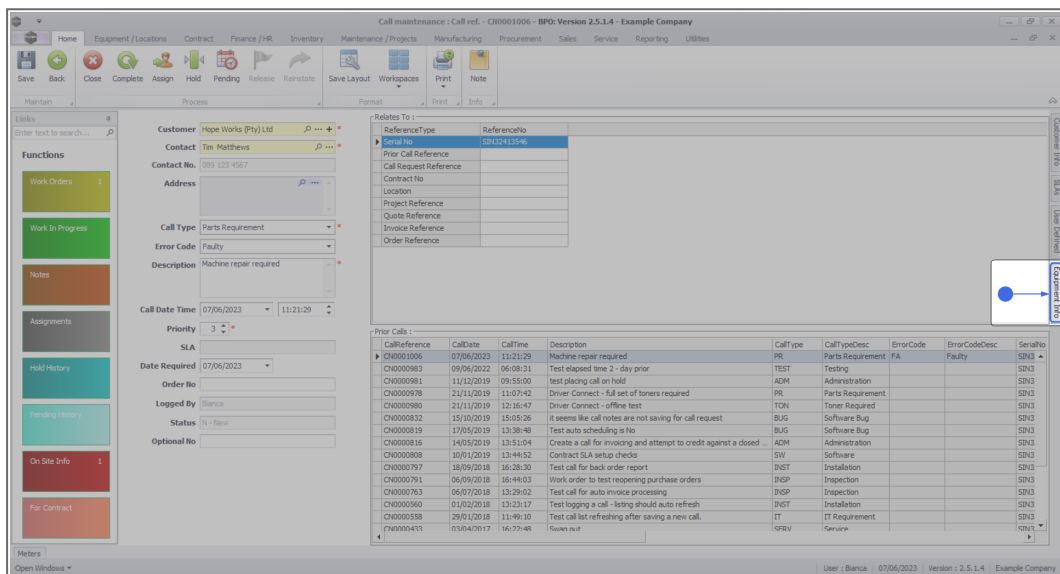
The Call maintain screen has a lot of helpful information that can be viewed when logging the call or after the call has been saved.

You can skip ahead to [Adding the Call Note](#) or [Saving the Call](#).

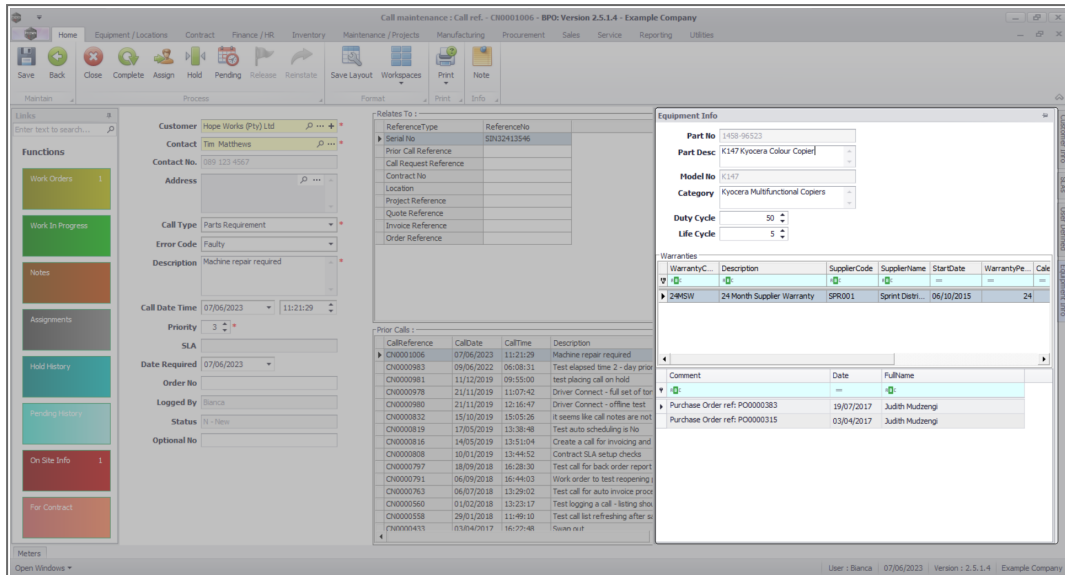
## EQUIPMENT INFO

The Equipment Information dock panel will only contain information where a **Serial Number** is linked to the call, as this information is related to the associated part number.

- Click on the Equipment Info tab.



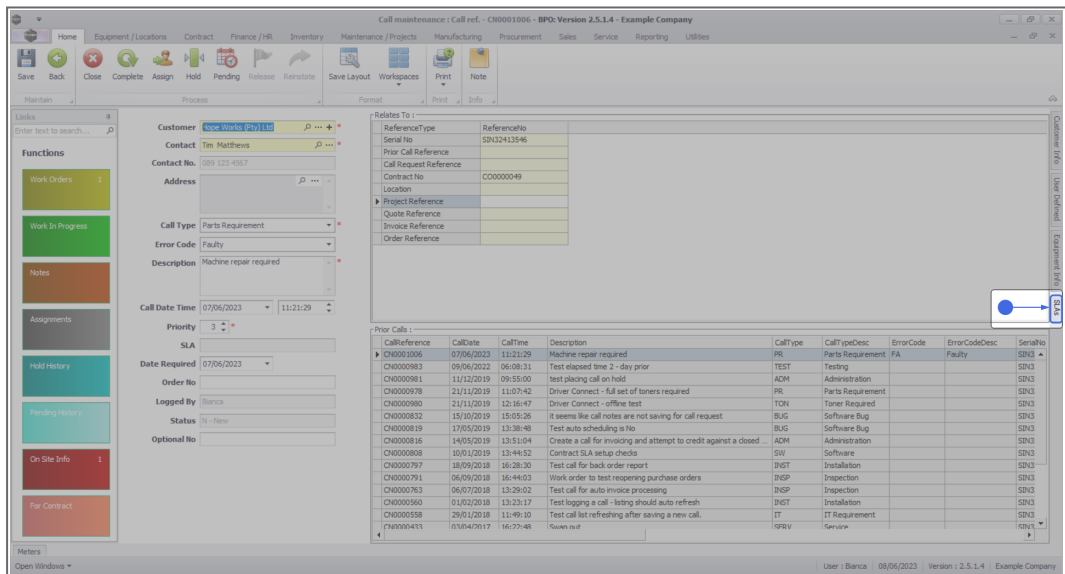
- The Equipment Info dock panel will open, displaying useful information related to the **serial number** and its **part number**.
  - Part No, Part Description, Model Number, Category, Duty Cycle and Life Cycle information related to the Part Number.
  - Warranties - will list any warranties assigned to the Serial Number.
  - Purchase Orders - ?



## SLAs

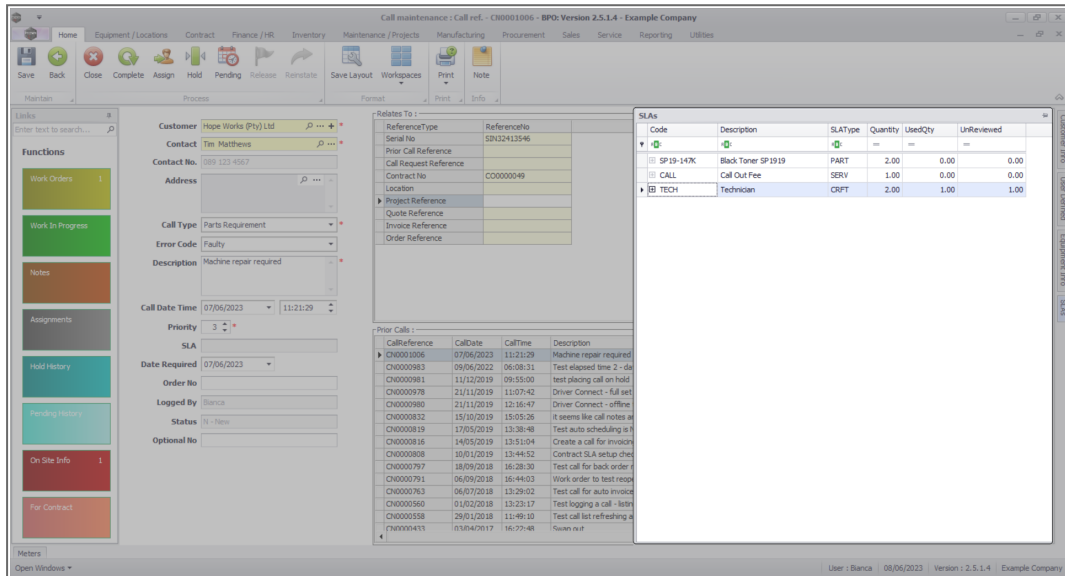
If the Item is on contract any SLA Contract Inclusion Items will display in this list.

- Click on the SLAs tab.



- The SLAs dock panel will open displaying the SLA Items as well as the quantity included.

For Labour Time, you will be able to see how many hours are included versus how many hours have been used. If Time Review is used, you can also see time logged that has not yet been reviewed as under SLA.



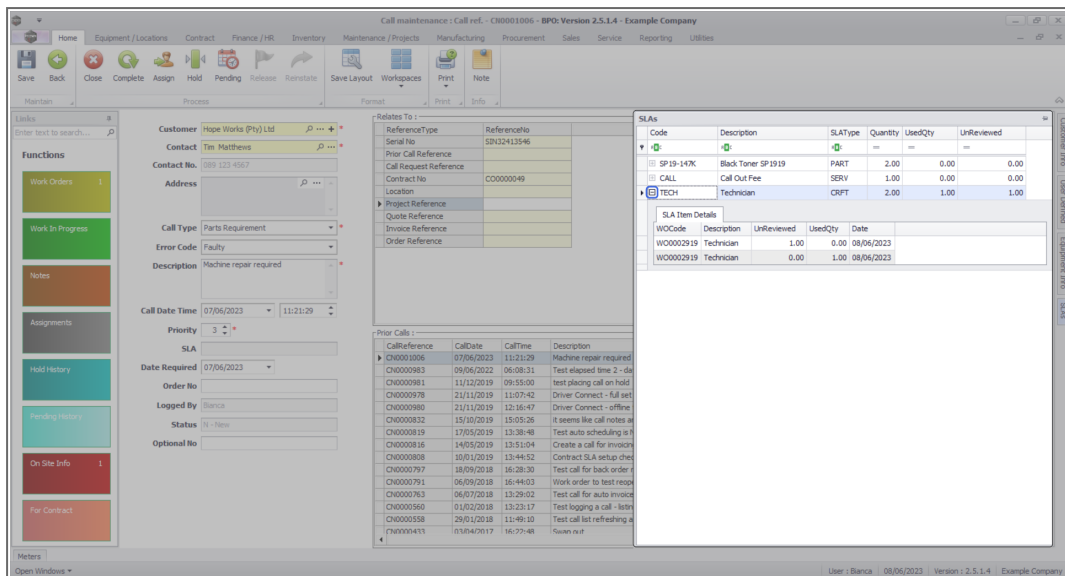
The screenshot shows the 'Log a Call' window in the CO3 Technologies software. The window is titled 'Call maintenance : Call ref. - CH0001006 - RPO: Version 2.5.1.4 - Example Company'. It features a top menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Save, Back, Close, Complete, Assign, Hold, Pending, Release, Reallocate, Save Layout, Workspaces, Print, and Note. The main area is divided into several sections:

- Functions:** A sidebar on the left with buttons for Work Orders, Work In Progress, Notes, Assignments, Hold History, Pending History, On Site Info, and For Contract.
- Customer Information:** Fields for Customer (Hope Works (Pty) Ltd), Contact (Tim Matthews), Contact No. (089 123 4567), Address, Call Type (Parts Requirement), Error Code (Faulty), Description (Machine repair required), Call Date Time (07/06/2023), Priority (3), SLA, Date Required (07/06/2023), Order No., Logged By (Bence), Status (N - New), and Optional No.
- Relates To:** A table showing related records with columns ReferenceType, ReferenceNo, Serial No, Prior Call Reference, Call Request Reference, Contract No, Location, Project Reference, Quote Reference, Invoice Reference, and Order Reference.
- Prior Calls:** A table showing a list of previous calls with columns CallReference, CallDate, CallTime, and Description.
- SLAs:** A table showing SLA items with columns Code, Description, SLA Type, Quantity, UsedQty, and UnReviewed.

The SLA table data is as follows:

| Code      | Description        | SLA Type | Quantity | UsedQty | UnReviewed |
|-----------|--------------------|----------|----------|---------|------------|
| SP19-147K | Black Toner SP1919 | PART     | 2.00     | 0.00    | 0.00       |
| CALL      | Call Out Fee       | SERV     | 1.00     | 0.00    | 0.00       |
| TECH      | Technician         | CRT      | 2.00     | 1.00    | 1.00       |

- Click on the expand data grid button to view the SLA Item Details
- This will show you a record of the items logged under SLA



| Code      | Description        | SLA Type | Quantity | Used Qty | Unreviewed |
|-----------|--------------------|----------|----------|----------|------------|
| SP19-147K | Black Toner SP1919 | PART     | 2.00     | 0.00     | 0.00       |
| CALL      | Call Out Fee       | SERV     | 1.00     | 0.00     | 0.00       |
| TECH      | Technician         | CRFT     | 2.00     | 1.00     | 1.00       |

| WCode     | Description | Unreviewed | UsedQty | Date       |
|-----------|-------------|------------|---------|------------|
| WO0002919 | Technician  | 1.00       | 0.00    | 08/06/2023 |
| WO0002919 | Technician  | 0.00       | 1.00    | 08/06/2023 |

| CallReference | CallDate   | CallTime | Description                 |
|---------------|------------|----------|-----------------------------|
| CH0001006     | 07/06/2023 | 11:21:29 | Machine repair required     |
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - de    |
| CH0000981     | 11/12/2019 | 09:35:00 | Test placing call on hold   |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - full act   |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline    |
| CH0000932     | 15/10/2019 | 15:05:26 | it seems like call notes ar |
| CH0000819     | 17/05/2019 | 13:30:48 | Test auto scheduling is r   |
| CH0000816     | 14/05/2019 | 13:51:04 | Create a call for invoice   |
| CH0000808     | 10/01/2019 | 13:44:52 | Contract SLA setup che      |
| CH0000797     | 18/09/2018 | 16:28:30 | Test call for back order    |
| CH0000791     | 06/09/2018 | 16:44:03 | Work order to test respo    |
| CH0000763     | 06/07/2018 | 13:29:02 | Test call for auto invoice  |
| CH0000560     | 01/02/2018 | 13:23:17 | Test logging a call - log   |
| CH0000558     | 29/01/2018 | 11:49:10 | Test call list refreshing a |
| CH0000433     | 03/04/2017 | 16:22:48 | Swan n.r.t                  |

## User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

### Version Compatibility<sup>1</sup>

- Click on the **User Defined** dock panel tab to open the panel.

||

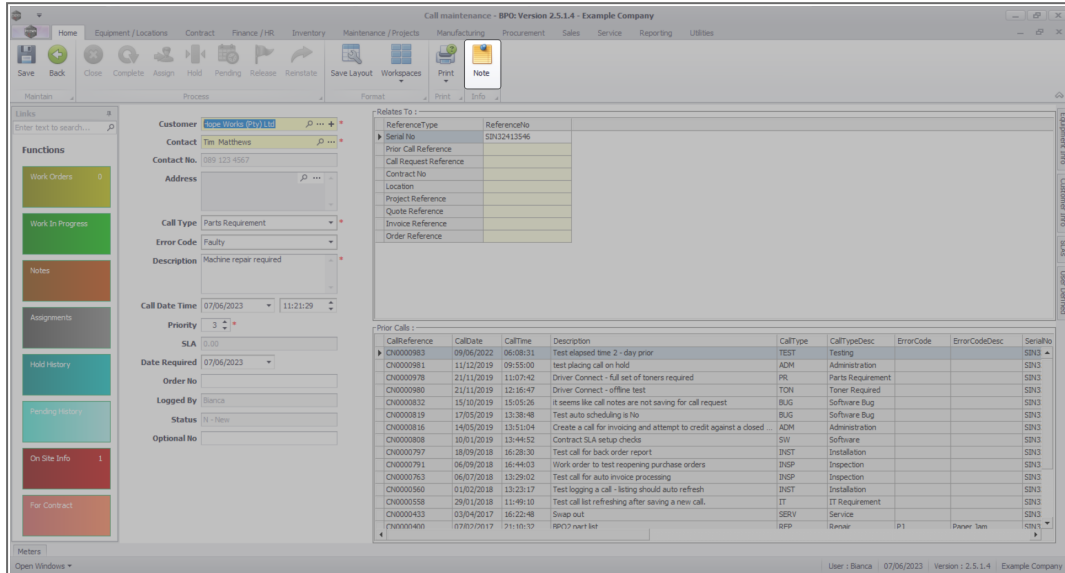
- Any custom fields configured and updated for the related **Customer**, **Asset** or **Location** and /or Contract linked to this call will display in the User Defined field panel.

||

<sup>1</sup> BPO2 v2.5.0.8 or higher. " Add Interest Rate " on page 2

## Add Call Note

- A Call Note can be added directly from the Call Maintain screen by clicking on **Note**.



| CallReference | CallDate   | CallTime | Description                                                        | CallType | CallTypeDesc      | ErrorCode | ErrorCodeDesc | SerialNo |
|---------------|------------|----------|--------------------------------------------------------------------|----------|-------------------|-----------|---------------|----------|
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior                                    | TEST     | Testing           |           |               | SN43     |
| CH0000981     | 11/12/2019 | 09:55:00 | test placing call on hold                                          | ADM      | Administration    |           |               | SN43     |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - full set of toners required                       | PR       | Parts Requirement |           |               | SN43     |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline test                                      | TON      | Toner Required    |           |               | SN43     |
| CH0000832     | 15/10/2019 | 15:05:26 | it seems like call notes are not saving for call request           | BUG      | Software Bug      |           |               | SN43     |
| CH0000819     | 17/05/2019 | 13:38:48 | Test auto scheduling is no                                         | BUG      | Software Bug      |           |               | SN43     |
| CH0000816     | 14/05/2019 | 13:51:04 | Create a call for invoicing and attempt to credit against a closed | ADM      | Administration    |           |               | SN43     |
| CH0000808     | 10/01/2019 | 13:44:52 | Contract SLA setup checks                                          | SW       | Software          |           |               | SN43     |
| CH0000797     | 18/09/2018 | 16:28:30 | Test call for back order report                                    | INST     | Installation      |           |               | SN43     |
| CH0000791     | 06/09/2018 | 16:44:03 | Work order to test resending purchase orders                       | INSP     | Inspection        |           |               | SN43     |
| CH0000763     | 06/07/2018 | 13:29:02 | Test call for auto invoice processing                              | INSP     | Inspection        |           |               | SN43     |
| CH0000560     | 01/02/2018 | 13:23:17 | Test logging a call - listing should auto refresh                  | INST     | Installation      |           |               | SN43     |
| CH0000558     | 29/01/2018 | 11:49:10 | Test call list refreshing after saving a new call.                 | IT       | IT Requirement    |           |               | SN43     |
| CH0000433     | 03/04/2017 | 16:22:48 | Swap out                                                           | SERV     | Service           |           |               | SN43     |
| CH0000400     | 07/02/2017 | 21:10:17 | RP17 next test                                                     | INSP     | Inspection        | P1        | Power Item    | SN43     |

- The **New Note** frame will be displayed.
- Click in the text area to type the customer note and click on **Close** when done.
- The Note will be saved as a Call Note when the call is saved.

Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: **Core Works Pty Ltd**  
 Contact: **Tim Matthews**  
 Contact No: 089 123 4567  
 Address: [Empty]  
 Call Type: **Parts Requirement**  
 Error Code: **Faulty**  
 Description: **Machine repair required**  
 Call Date Time: 07/06/2023 11:21:29  
 Priority: 3  
 Date Required: 07/06/2023  
 Order No: [Empty]  
 Logged By: **Blanca**  
 Status: **New**  
 Optional No: [Empty]

Relates To:

| ReferenceType          | ReferenceNo |
|------------------------|-------------|
| Serial No              | SNJ32413546 |
| Prior Call Reference   |             |
| Call Request Reference |             |
| Contract No            |             |
| Location               |             |
| Project Reference      |             |
| Quote Reference        |             |
| Invoice Reference      |             |
| Order Reference        |             |

New Note  
 Client has requested a loan unit while their unit is being repaired.

Prior Calls:

| CallReference | CallDate   | CallTime | Description                                                        | CallType | CallTypeDesc      | ErrorCode | ErrorCodeDesc | SerialNo |
|---------------|------------|----------|--------------------------------------------------------------------|----------|-------------------|-----------|---------------|----------|
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior                                    | TEST     | Testing           |           |               | SNJ3     |
| CH0000981     | 11/12/2019 | 09:55:00 | test placing call on hold                                          | ADM      | Administration    |           |               | SNJ3     |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - full set of toners required                       | PR       | Parts Requirement |           |               | SNJ3     |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline test                                      | TON      | Toner Required    |           |               | SNJ3     |
| CH0000832     | 15/10/2019 | 15:05:26 | it seems like call notes are not saving for call request           | BUG      | Software Bug      |           |               | SNJ3     |
| CH0000819     | 17/05/2019 | 13:38:48 | Test auto scheduling is No                                         | BUG      | Software Bug      |           |               | SNJ3     |
| CH0000816     | 14/05/2019 | 13:51:04 | Create a call for invoicing and attempt to credit against a closed | ADM      | Administration    |           |               | SNJ3     |
| CH0000808     | 10/01/2019 | 13:44:52 | Contract SLA setup checks                                          | SW       | Software          |           |               | SNJ3     |
| CH0000797     | 18/09/2018 | 16:28:30 | Test call for back order report                                    | INST     | Installation      |           |               | SNJ3     |
| CH0000791     | 06/09/2018 | 16:44:03 | Work order to test reordering purchase orders                      | INSP     | Inspection        |           |               | SNJ3     |
| CH0000763     | 06/07/2018 | 13:29:02 | Test call for auto invoice processing                              | INSP     | Inspection        |           |               | SNJ3     |
| CH0000580     | 01/02/2018 | 13:23:17 | Test logging a call - listing should auto refresh                  | INST     | Installation      |           |               | SNJ3     |
| CH0000558     | 29/01/2018 | 11:49:10 | Test call list refreshing after saving a new call.                 | IT       | IT Requirement    |           |               | SNJ3     |
| CH0000433     | 03/04/2017 | 16:22:48 | Swap out                                                           | SERV     | Service           |           |               | SNJ3     |
| CH0000400     | 07/07/2017 | 21:10:17 | RPT07 new list                                                     | RPT      | Report            | P1        | Power Test    | SNJ3     |

User: Blanca 07/06/2023 Version: 2.5.1.4 Example Company

- Refer to **Calls - Notes** to view a list of all the notes created for the Call.

## SAVE THE CALL

- When you are done, click on **Save**.

Call maintenance - BPO: Version 2.5.1.4 - Example Company

Customer: **Core Works Pty Ltd**  
 Contact: **Tim Matthews**  
 Contact No: 089 123 4567  
 Address: [Empty]  
 Call Type: **Parts Requirement**  
 Error Code: **Faulty**  
 Description: **Machine repair required**  
 Call Date Time: 07/06/2023 11:21:29  
 Priority: 3  
 Date Required: 07/06/2023  
 Order No: [Empty]  
 Logged By: **Blanca**  
 Status: **New**  
 Optional No: [Empty]

Relates To:

| ReferenceType          | ReferenceNo |
|------------------------|-------------|
| Serial No              | SNJ32413546 |
| Prior Call Reference   |             |
| Call Request Reference |             |
| Contract No            |             |
| Location               |             |
| Project Reference      |             |
| Quote Reference        |             |
| Invoice Reference      |             |
| Order Reference        |             |

Prior Calls:

| CallReference | CallDate   | CallTime | Description                                                        | CallType | CallTypeDesc      | ErrorCode | ErrorCodeDesc | SerialNo |
|---------------|------------|----------|--------------------------------------------------------------------|----------|-------------------|-----------|---------------|----------|
| CH0000983     | 09/06/2022 | 06:08:31 | Test elapsed time 2 - day prior                                    | TEST     | Testing           |           |               | SNJ3     |
| CH0000981     | 11/12/2019 | 09:55:00 | test placing call on hold                                          | ADM      | Administration    |           |               | SNJ3     |
| CH0000978     | 21/11/2019 | 11:07:42 | Driver Connect - full set of toners required                       | PR       | Parts Requirement |           |               | SNJ3     |
| CH0000980     | 21/11/2019 | 12:16:47 | Driver Connect - offline test                                      | TON      | Toner Required    |           |               | SNJ3     |
| CH0000832     | 15/10/2019 | 15:05:26 | it seems like call notes are not saving for call request           | BUG      | Software Bug      |           |               | SNJ3     |
| CH0000819     | 17/05/2019 | 13:38:48 | Test auto scheduling is No                                         | BUG      | Software Bug      |           |               | SNJ3     |
| CH0000816     | 14/05/2019 | 13:51:04 | Create a call for invoicing and attempt to credit against a closed | ADM      | Administration    |           |               | SNJ3     |
| CH0000808     | 10/01/2019 | 13:44:52 | Contract SLA setup checks                                          | SW       | Software          |           |               | SNJ3     |
| CH0000797     | 18/09/2018 | 16:28:30 | Test call for back order report                                    | INST     | Installation      |           |               | SNJ3     |
| CH0000791     | 06/09/2018 | 16:44:03 | Work order to test reordering purchase orders                      | INSP     | Inspection        |           |               | SNJ3     |
| CH0000763     | 06/07/2018 | 13:29:02 | Test call for auto invoice processing                              | INSP     | Inspection        |           |               | SNJ3     |
| CH0000580     | 01/02/2018 | 13:23:17 | Test logging a call - listing should auto refresh                  | INST     | Installation      |           |               | SNJ3     |
| CH0000558     | 29/01/2018 | 11:49:10 | Test call list refreshing after saving a new call.                 | IT       | IT Requirement    |           |               | SNJ3     |
| CH0000433     | 03/04/2017 | 16:22:48 | Swap out                                                           | SERV     | Service           |           |               | SNJ3     |
| CH0000400     | 07/07/2017 | 21:10:17 | RPT07 new list                                                     | RPT      | Report            | P1        | Power Test    | SNJ3     |

User: Blanca 07/06/2023 Version: 2.5.1.4 Example Company

- Call Listing - BPO Version 2.5.1.4 - Example Company**

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

Add Edit Refresh My Calls Assign Workspaces Save Filter Format Work Close Complete Hold Pending Release Print Reports

MainTab State Filter

Stop a column header time to group by that column

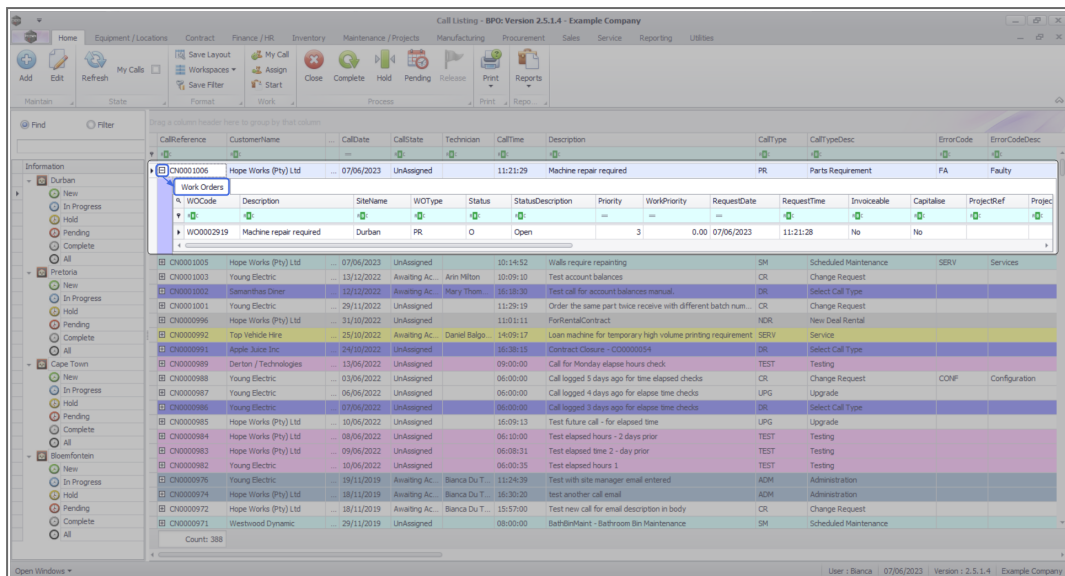
| CallReference | CustomerName          | CalDate    | CallDate    | Technician   | CallTime | Description                                                  | CallType | CallTypDesc           | ErrorCode | ErrorCodeDesc |
|---------------|-----------------------|------------|-------------|--------------|----------|--------------------------------------------------------------|----------|-----------------------|-----------|---------------|
| CH0001006     | Hope Works (Phy) Ltd  | 07/06/2023 | Unassigned  | 11:21:29     |          | Machine repair required                                      | PR       | Parts Requirement     | FA        | Faulty        |
| CH0001005     | Hope Works (Phy) Ltd  | 07/06/2023 | Unassigned  | 10:14:52     |          | Walls require repainting                                     | SM       | Scheduled Maintenance | SRV       | Services      |
| CH0001003     | Young Electric        | 13/12/2022 | Awaiting AC | 10:09:10     |          | Test account balances manual.                                | CR       | Change Request        |           |               |
| CH0001002     | Sarahine Dier         | 13/12/2022 | Awaiting AC | Mary Hiron   | 10:08:50 | Test call for account balances manual.                       | DR       | Select Call Type      |           |               |
| CH0001001     | Young Electric        | 29/11/2022 | Unassigned  | 11:29:19     |          | Order the same part twice receive with different batch num.  | CR       | Change Request        |           |               |
| CH0000999     | Hope Works (Phy) Ltd  | 21/10/2022 | Unassigned  | 11:01:11     |          | Forfeited Contract                                           | NCR      | New Deal Rental       |           |               |
| CH0000992     | Top Vehicle Hire      | 25/10/2022 | Awaiting AC | Daniel Balgo | 14:09:17 | Lease machine for temporary high volume printing requirement | SERV     | Service               |           |               |
| CH0000991     | Apple Juice Inc       | 24/10/2022 | Unassigned  | 16:38:15     |          | Contract Closure - C0000000094                               | DR       | Select Call Type      |           |               |
| CH0000989     | Berton / Technologies | 13/06/2022 | Unassigned  | 09:00:00     |          | Call for Monday elapse hours check                           | TEST     | Testing               |           |               |
| CH0000988     | Young Electric        | 03/06/2022 | Unassigned  | 06:00:00     |          | Call logged 5 days ago for time elapsed checks               | CR       | Change Request        | CONF      | Configuration |
| CH0000987     | Young Electric        | 06/06/2022 | Unassigned  | 06:00:00     |          | Call logged 4 days ago for elapse time checks                | LPG      | Upgrade               |           |               |
| CH0000986     | Young Electric        | 07/06/2022 | Unassigned  | 06:00:00     |          | Call logged 3 days ago for elapse time checks                | DR       | Select Call Type      |           |               |
| CH0000985     | Hope Works (Phy) Ltd  | 10/06/2022 | Unassigned  | 16:09:13     |          | Test future call - for elapsed time                          | LPG      | Upgrade               |           |               |
| CH0000984     | Hope Works (Phy) Ltd  | 08/06/2022 | Unassigned  | 06:10:00     |          | Test elapsed hours ~ 2 days prior                            | TEST     | Testing               |           |               |
| CH0000983     | Hope Works (Phy) Ltd  | 09/06/2022 | Unassigned  | 06:08:31     |          | Test elapsed time 2 - day prior                              | TEST     | Testing               |           |               |
| CH0000982     | Young Electric        | 09/06/2022 | Unassigned  | 06:00:35     |          | Test elapsed hours 1                                         | TEST     | Testing               |           |               |
| CH0000978     | Young Electric        | 29/11/2019 | Awaiting AC | Bianca Du T  | 11:24:39 | Test with site manager email entered                         | ACH      | Administration        |           |               |
| CH0000974     | Hope Works (Phy) Ltd  | 18/11/2019 | Awaiting AC | Bianca Du T  | 16:30:20 | Test another call email                                      | ACH      | Administration        |           |               |
| CH0000972     | Hope Works (Phy) Ltd  | 18/11/2019 | Awaiting AC | Bianca Du T  | 15:57:00 | Test new call for email description in body                  | CR       | Change Request        |           |               |
| CH0000971     | Westwood Dynamic      | 29/11/2019 | Unassigned  | 08:00:00     |          | Bathf-Hant - Bathroom Bin Maintenance                        | SM       | Scheduled Maintenance |           |               |
| CH0000970     | Westwood Dynamic      | 22/11/2019 | Unassigned  | 08:00:00     |          | Bathf-Hant - Bathroom Bin Maintenance                        | SM       | Scheduled Maintenance |           |               |
| CH0000969     | Hope Works (Phy) Ltd  | 16/11/2019 | Unassigned  | 08:00:00     |          | Check lighting system and fixtures                           | INST     | Installation          |           |               |
| CH0000968     | Green Tea Supplies    | 16/11/2019 | Unassigned  | 08:00:00     |          | ZMS - 2 month service                                        | SM       | Scheduled Maintenance |           |               |
| CH0000967     | Westwood Dynamic      | 15/11/2019 | Unassigned  | 08:00:00     |          | Bathf-Hant - Bathroom Bin Maintenance                        | SM       | Scheduled Maintenance |           |               |
| CH0000966     | Westwood Dynamic      | 08/11/2019 | Unassigned  | 08:00:00     |          | Bathf-Hant - Bathroom Bin Maintenance                        | SM       | Scheduled Maintenance |           |               |

Count: 388

Open Windows ▾ User : Bianca / 07/06/2023 Version : 2.5.1.4 Example Company

For standard call centre processing, the underlying Work Order is automatically created.

- From the **Call Listing** screen,
- Click on the **expand button [+]** in the row of the **call log** you wish to view the **work order details** for.
- The **Work Order data grid** will expand to display the generated **work order number** and all the information related to the call log.



You can also view the [call work order](#)(s) from the call maintain screen.

## ADDITIONAL DETAIL SELECTION METHODS

As noted in the introduction text, using these detail selection methods can help speed up the call logging process.

## LOG CALL FROM THE SERIAL NUMBER OR LOCATION

- In the **Relates To** frame, select either the **Serial No.** or the **Location**.
- The associated Customer and Customer details will auto populate, and if the item selected is on Contract, the Contract Number will also auto populate.

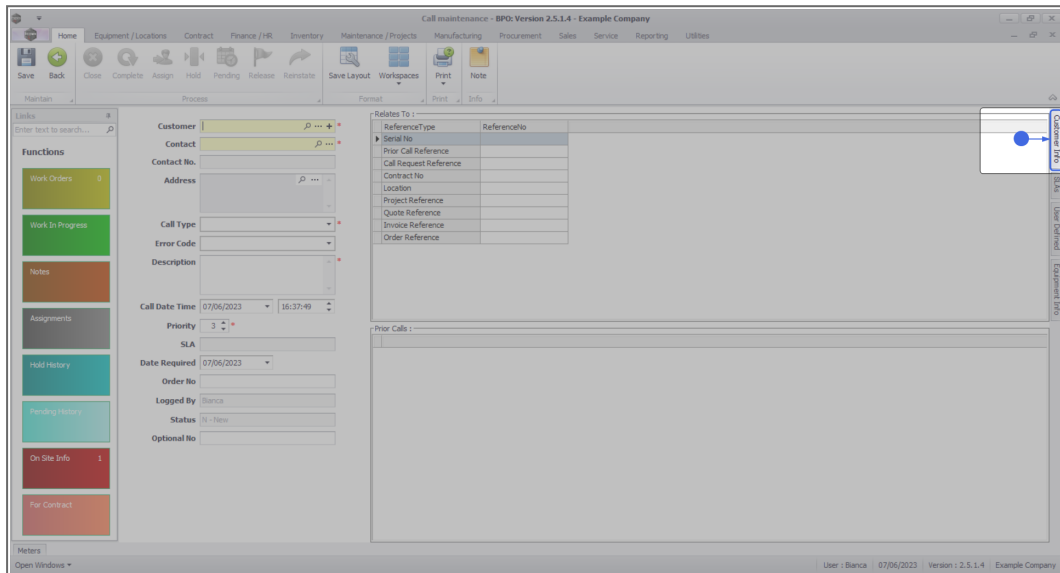
## FIND CUSTOMER BY TEL NO

Alternatively, search for the customer by **Telephone Number**.

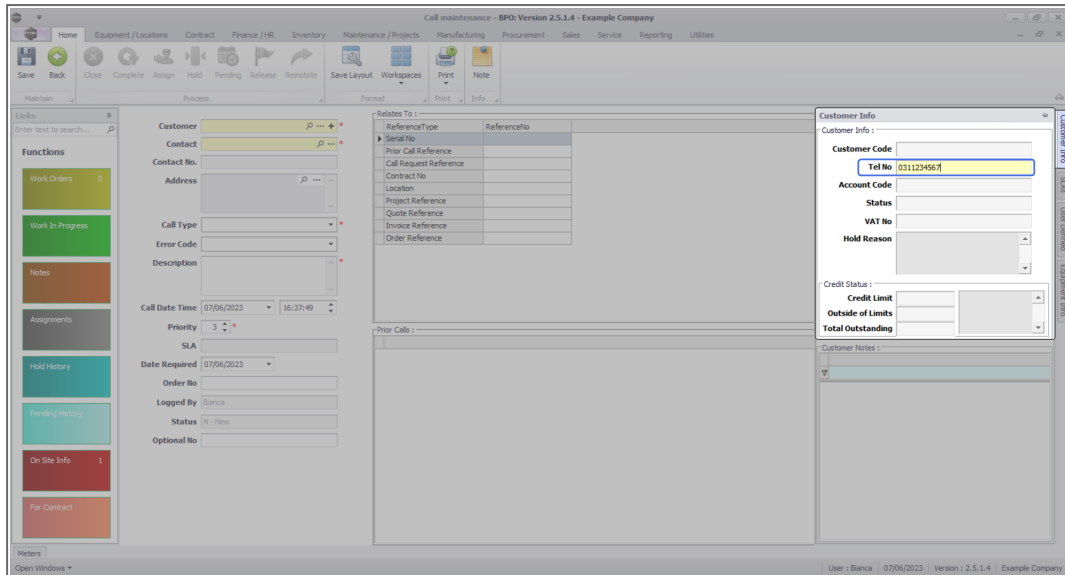


**Note** that the telephone number saved on the customer record, and the number you are searching for should not have any spaces.

- From the **Call maintenance** screen,
- Click on the **Customer Info** tab.



- In the Tel No field, type in the telephone number and press enter on your keyboard.
  - If the number matches a telephone number on a single Customer, the customer details will populate.
  - If a few customers have the same telephone number, a lookup will list display that you can select from.



- The associated Customer and Customer details will auto populate.

## Related Topics

- [Introduction to Work Orders](#)
- [Calls - Add New Contact](#)
- [Calls - Edit Buttons](#)
- [Calls - Customers on Hold](#)

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