

## SERVICE

# CALL ADMINISTRATION - CALL SALES QUOTES

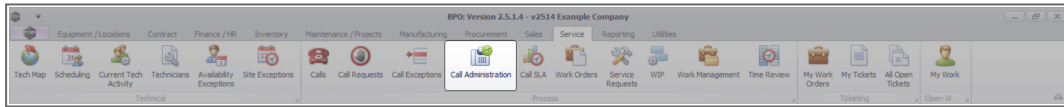
The Call Administration screen is part of the Extended Call Centre - Version Compatibility<sup>1</sup>

The **Quotes** tile is a quick way to navigate to the list of Quotes related to the selected call.

## THE CALL ADMINISTRATION LISTING SCREEN

---

*Ribbon* Select **Service** > **Call Administration**



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

---

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

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service			19
CH000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			19
CH000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			19
CH000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan	14:13:49	Service required	SERV	Service			19
CH000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			14
CH000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha	12:14:38	Toner required	TON	Toner Required			20
CH000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
CH000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har	12:26:58	Machine service required	SERV	Service			53
CH000067	Danny Storms IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo	11:23:30	Test BPO fit tran	NDS	New Deal Sale			
CH000069	Danny Storms IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			19
CH000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service			
CH000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlien Jessi	11:04:32	Machine service required	SERV	Service			ab
CH000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlien Jessi	11:41:18	test	NDS	New Deal Sale			
CH000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlien Jessi	12:07:35	Service and toner required	SERV	Service			19
CH000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan	16:17:59	Magenta toner required	TON	Toner Required			19
CH000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan	16:21:59	CO789	NDS	New Deal Sale			
CH000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jan	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH000099	Bobas Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su	09:52:00	test machine	REP	Repair			19
CH000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	09:37:02	test	REP	Repair			19
CH000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	10:09:53	test	SERV	Service			19
CH000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			

- Click on the row selector of the call you would like to work with.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service			19
CH000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha	13:59:38	Machine repair needed	REP	Repair			19
CH000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			19
CH000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan	14:13:49	Service required	SERV	Service			19
CH000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			14
CH000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha	12:14:38	Toner required	TON	Toner Required			20
CH000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
CH000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har	12:26:58	Machine service required	SERV	Service			53
CH000067	Danny Storms IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo	11:23:30	Test BPO fit tran	NDS	New Deal Sale			
CH000069	Danny Storms IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			19
CH000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service			
CH000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlien Jessi	11:04:32	Machine service required	SERV	Service			ab
CH000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlien Jessi	11:41:18	test	NDS	New Deal Sale			
CH000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlien Jessi	12:07:35	Service and toner required	SERV	Service			19
CH000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan	16:17:59	Magenta toner required	TON	Toner Required			19
CH000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan	16:21:59	CO789	NDS	New Deal Sale			
CH000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jan	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH000099	Bobas Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su	09:52:00	test machine	REP	Repair			19
CH000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	09:37:02	test	REP	Repair			19
CH000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su	10:09:53	test	SERV	Service			19
CH000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			

## QUOTES

- Click on the **Quotes** tile.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0001036	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Belinda Sha.	10:40:51	Copier keeps jamming.	SERV	Service			20
CH0001035	Hope Works (Pty) Ltd	12/12/2023	Unassigned		10:38:38	Paper keeps jamming.	REP	Repair			20
CH0001034	Hope Works (Pty) Ltd	12/12/2023	Awaiting Ac.	Banca Du T.	10:29:04	Full set of toners required.	TON	Toner Required			AT
CH0001033	Young Electric	05/12/2023	Unassigned		15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale			
CH0001032	Young Electric	02/10/2023	Unassigned		13:35:12	Test credit note on work order	MAN	Manufacturing			
CH0001031	Hope Works (Pty) Ltd	29/09/2023	Unassigned		12:56:41	New Deal created from order CR0000305	NDS	New Deal Sale			
CH0001024	Hope Works (Pty) Ltd	12/09/2023	Unassigned		09:23:30	Contract for Expiry Test	NDR	New Deal Rental			
CH0001023	Derton / Technologies	08/09/2023	Unassigned		10:52:25	Open warranty claims have not been processed.	INSP	Inspection			20
CH0001022	/ Technologies	08/09/2023	Unassigned		10:44:45	Meters attached with no readings captured	INST	Installation			20
CH0001021	/ Technologies	07/09/2023	Unassigned		10:43:14	Call Exceptions - to correct but not flag.	INCT	Installation			20
CH0001020	Works (Pty) Ltd	05/09/2023	Awaiting Ac.	Banca Du T.	15:56:53	Test call site functionality	SERV	Service			20
CH0001019	Juice Inc	22/08/2023	Unassigned		11:30:52	Contract Closure - CD0000086	TR	Training			
CH0001018	Copiers	22/08/2023	Unassigned		11:28:32	Contract Closure - CD0000041	DR	Select Call Type			
CH0001017	Electric	22/08/2023	Unassigned		11:28:26	Contract Closure - CD0000031	DR	Select Call Type			
CH0001016	g Shoes	22/08/2023	Unassigned		11:28:18	Contract Closure - CD0000001	DR	Select Call Type			
CH0001015	Young Electric	22/08/2023	Unassigned		11:27:49	Contract Closure - CD0000008	DR	Select Call Type			
CH0001014	Office Supplies Unlimited	22/08/2023	Unassigned		11:27:30	Contract Closure - CD0000006	DR	Select Call Type			
CH0001013	Apple Juice Inc	25/07/2023	Unassigned		10:18:33	Machine inspection required	INSP	Inspection			
CH0001012	Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac.	Banca Du T.	11:21:29	Machine repair required	PR	Parts Requirement	SERV	Services	50
CH0001011	Hope Works (Pty) Ltd	07/06/2023	Unassigned		10:14:52	Wills require repairing	SM	Scheduled Maintenance	SERV	Services	10
CH0001010	Young Electric	12/12/2022	Awaiting Ac.	Ann Milton	10:09:10	Test account balances	DR	Select Call Type			10
CH0001009	Samanthas Diner	12/12/2022	Awaiting Ac.	Mary Thom.	16:18:30	Test call for account balances manual.	DR	Select Call Type			19
CH0001008	Young Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	PR	Parts Requirement			10
CH0001007	Hope Works (Pty) Ltd	31/10/2022	Unassigned		11:01:11	ForRentalContract	NDR	New Deal Rental			
CH0001006	Apple Juice Inc	24/10/2022	Unassigned		16:38:15	Contract Closure - CD0000054	ADM	Administration			

- The **Quotes** listing screen will open displaying the Quotes related to the selected call.

QuoteReference	CustomerCode	CustomerName	QuoteDescription	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStat.	Status
QT0000288	DER001	Derton / Technologies	Quote Extra Parts Required	1,120.56	ZAR	1.00	15.00	07/12/2023	Banca Du Tait		N	A

For a detailed handling of this topic refer to Calls - Sales Quotes

## Related Topics

- [Service - Introduction to Call Administration](#)
- [Call Administration - Edit a Call](#)
- [Call Administration - My Calls](#)
- [Call Administration - Assign a Call](#)
- [Call Administration - Start or End Work](#)
- [Call Administration - Close a Call](#)
- [Call Administration - Complete a Call](#)
- [Call Administration - Hold a Call](#)
- [Call Administration - Pend a Call](#)
- [Call Administration - Release a Call](#)
- [Call Administration - Reinstate a Call](#)

MNU.124.025