

We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – LOCATIONS

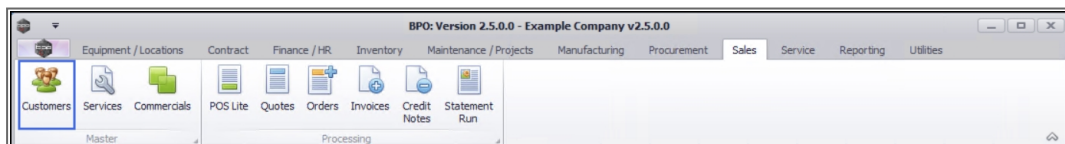
A Customer Location can be created when using the system to keep track of, and bill clients, on services relating to items that are not serialised assets, e.g. building maintenance / cleaning and hygiene maintenance / security services.

A customer location can be created in the **Customer Listing** screen or **Functional Locations** screen.

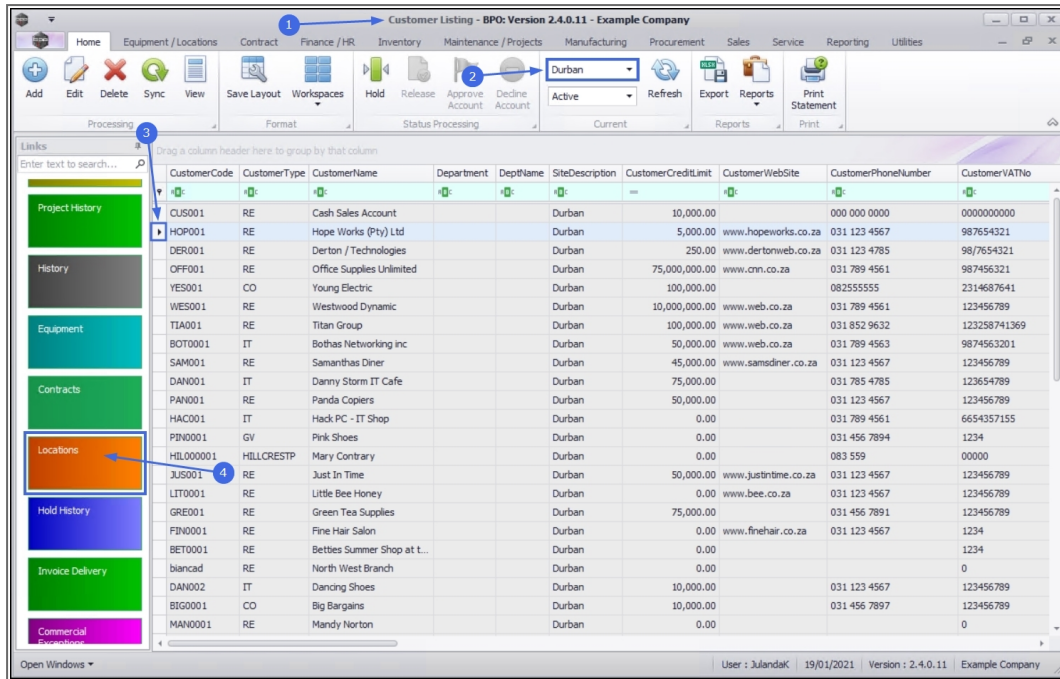
To add scheduled maintenance tasks to a customer location - you will need to edit the location in the Functional Location screen.

A customer location can be **linked to a contract** for billing.

Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the Site where the customer can be located.
 - The example has **Durban** selected.
3. Select the **row** of the **customer** whose locations you wish to view.
4. Click on the **Locations** tile.

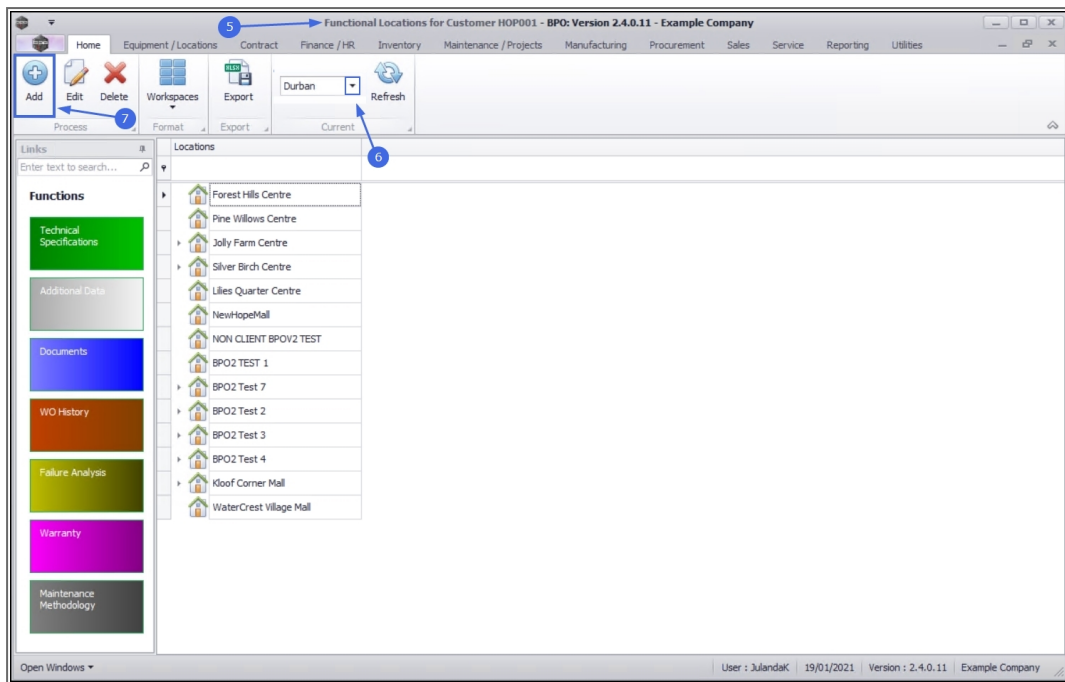


ADD MAIN LOCATION

5. The **Functional Locations for Customer** [customer code] screen will be displayed.
6. Confirm that the correct **Site** has been select**Functional Locations for Customer** [ed before continuing.
7. Click on **Add**.



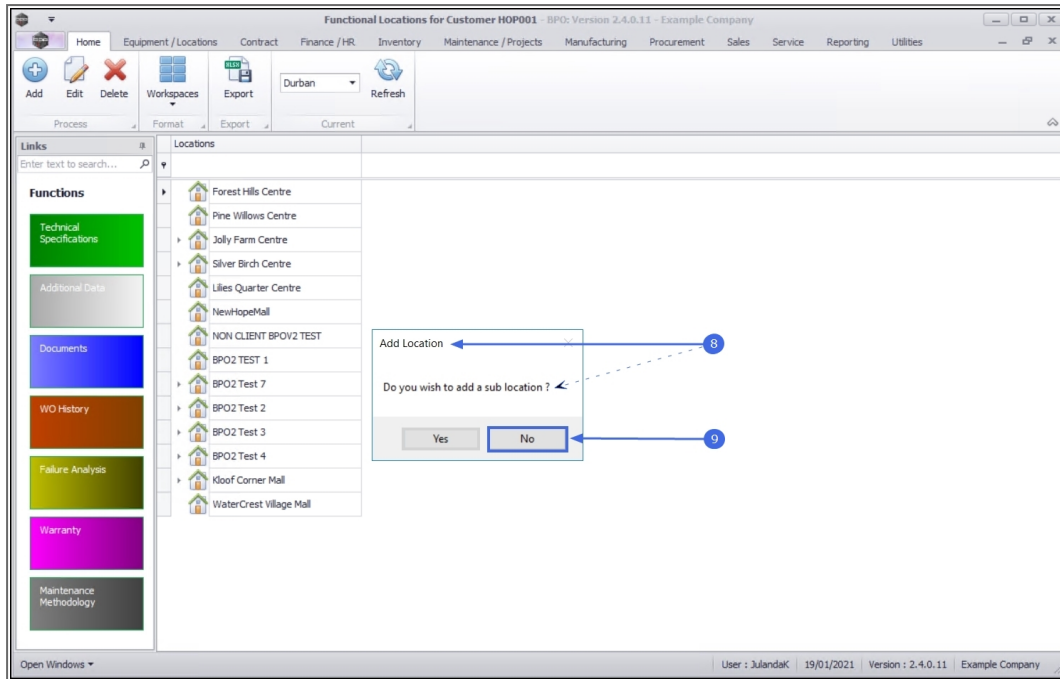
Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



8. When you receive the **Add Location** message requesting;
 - **Do you wish to add a sub location?**
9. Select **No** for creating the Main Location.



Note: Select Yes only if you have already set up the main location, and you are creating the sub-locations beneath it.



10. The **Add new functional location** screen will be displayed.

LOCATION DETAILS

- **Site:** The site will auto populate with your original site selection.
- **Location:** Type in a description of the Main Location, for example the name of the building name.
- **Customer:** The customer will auto populate with the name of the customer selected on the Customer listing screen.
- You have the option to change the customer by clicking on the **search** button, to select an alternative customer, if required.
- **Type:** Type will link the relevant **type** items to this location, for example Software, Equipment, etc.
- To select the type, click on the **search** button to display the **Select the type for this Location** screen to select and add the type applicable.

- **Class:** Class will link the relevant **class** items to this location, for example if you have selected Software as the type, then you can further specify Internal or External software.
- To select the class item, click on the **search** button to display **Select the class for this Location** screen, to select and add the relevant class item.
- **Category:** The category will link the relevant items to categorise this location.
- To select the category, click on the search button to display the **Select the category for this Location** screen, to select the applicable category.
- **Priority:** Select the work order **priority**¹ for this location from 1-5.

WORK ORDER

In the Work Order frame, tick the check boxes, as required:

- **Tasks:** Tasks for the location will be linked to the task instructions on the Work Order when the check box has been selected, for instance, Clean Machine. Refer to [Work Orders - Task Instructions](#)
- **WO Notification:** A Work Order notification will be sent for scheduled tasks when the check box has been selected. Refer to [Work Orders - Maintenance](#)
- **WO Default Item:** The Default settings will apply to Work Orders for this Customer location, as set out in the Work Order Management. Refer to [Introduction to Work Management](#)

¹1 = Most Important and 5 = Least Important

PHYSICAL LOCATION

In the Physical Location frame:

- **Location Lines 1-4:** Type in the Address / Location information, as required using the available fields.

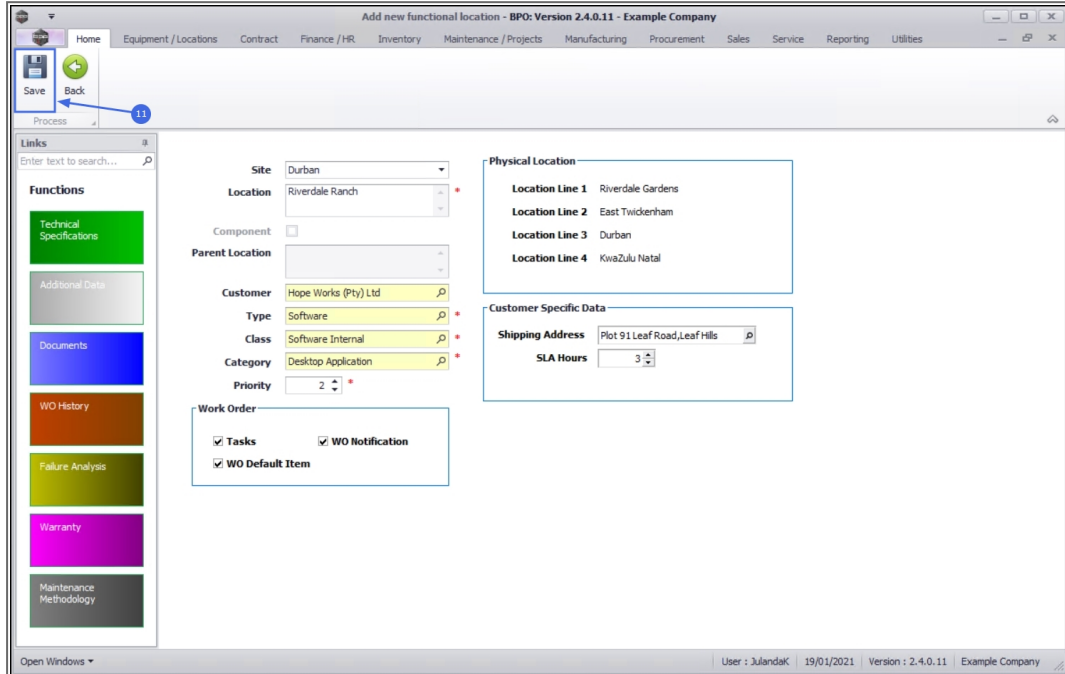
CUSTOMER SPECIFIC DATA

- **Shipping Address:** To select the shipping address, click on the search button to display the **Select the shipping address for this customer** screen, to select and add the shipping address for the location.
- A new company config flag ([AutoUpdateShippingAddress](#)) is available in BPO2 v2.5.0.8 (or higher) / Nucleus Service to control automated shipping address updates in the system between contract items and equipment shipping addresses/ functional location shipping address and ensures the shipping address correlates to contract items shipping address. When you update the shipping address on a contract the shipping address will reflect on the asset or functional location. If the user updates the asset or functional location's shipping address, the shipping address will reflect on the contract item.
- **SLA Hours¹:** Specify the Service Level Agreement for the Customer Main Location.

¹This 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).

SAVE LOCATION

11. When you have completed adding the information for the Main Location, click on **Save**.



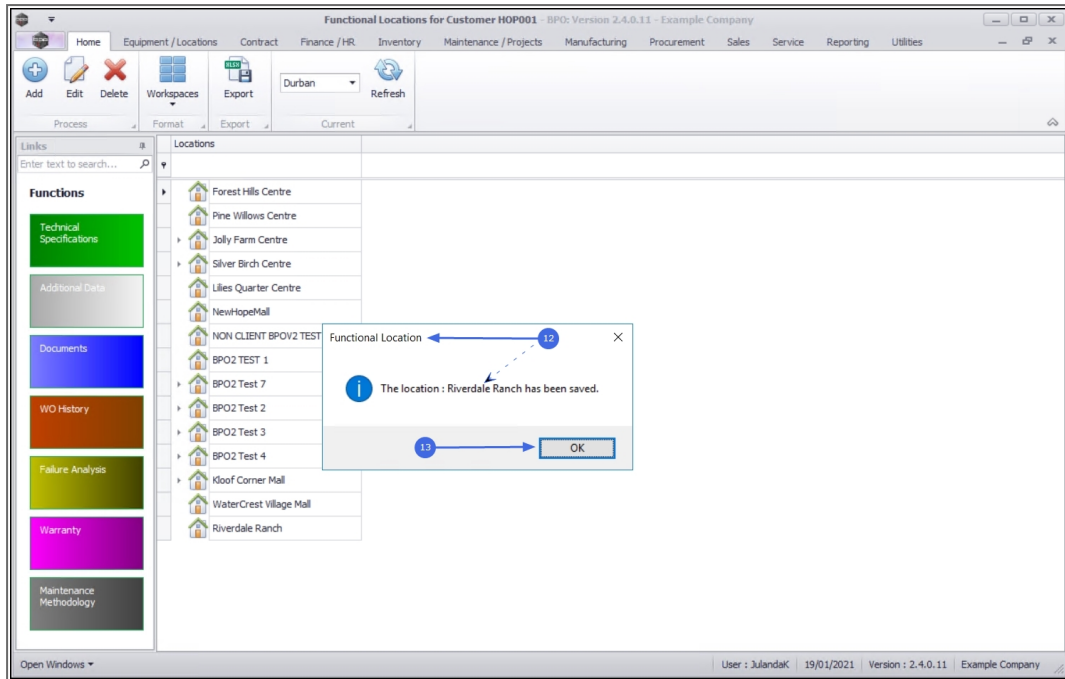
The screenshot shows the 'Add new functional location' form in the CO3 BPO software. The 'Save' button is highlighted with a red circle and a blue arrow pointing to it. The form contains the following fields and options:

- Site:** Durban
- Location:** Riverdale Ranch
- Component:** (empty)
- Parent Location:** (empty)
- Customer:** Hope Works (Pty) Ltd
- Type:** Software
- Class:** Software Internal
- Category:** Desktop Application
- Priority:** 2
- Physical Location:**
 - Location Line 1: Riverdale Gardens
 - Location Line 2: East Twickenham
 - Location Line 3: Durban
 - Location Line 4: KwaZulu Natal
- Customer Specific Data:**
 - Shipping Address: Plot 91 Leaf Road, Leaf Hills
 - SLA Hours: 3
- Work Order:**
 - ☒ Tasks
 - ☒ WO Notification
 - ☒ WO Default Item

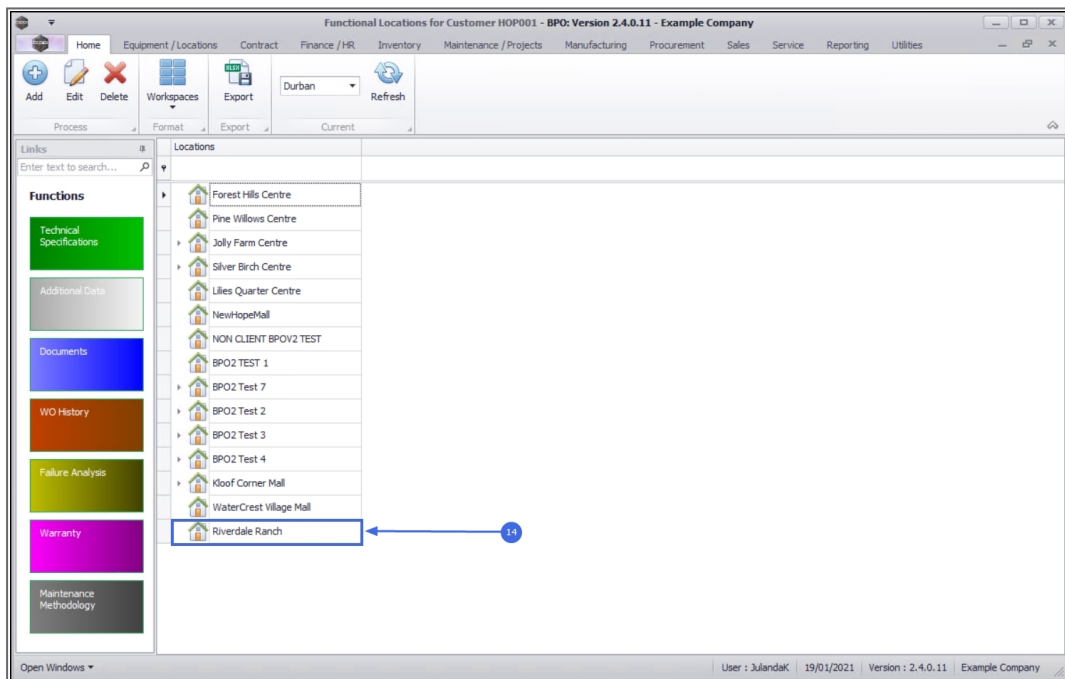
12. When you receive the **Functional Location** message informing you that;

- **The location: [functional location name] has been saved.**

13. Click on **OK**.



14. You can now view the newly added location in the **Functional Locations for Customer** screen.



ADD SUB-LOCATION

To set up a second level of Locations,

1. From the **Functional Locations for Customer** [customer code] screen,
2. Ensure that the correct **Site** has been selected.
3. Select the **row** of the main location you wish to add a sub location(s) to.

- The example has **Riverdale Ranch** selected.

4. Click on **Add**.

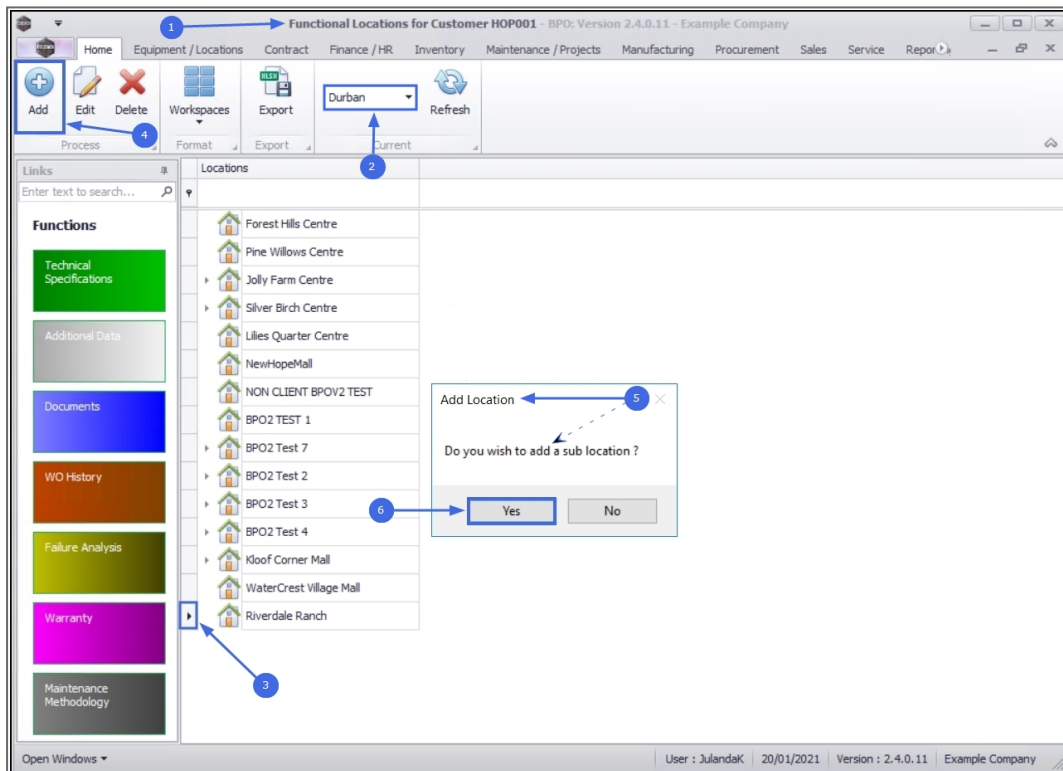


Short cut key: Right click to display the **All groups** menu list. Click on **Add**.

5. When you receive the **Add Location** message requesting;

- **Do you wish to add a sub location?**

6. Click on **Yes**.



7. The **Add new functional location** screen will be displayed.

ADD SUB-LOCATION DETAILS

Update the details for the **Sub-location** as you would for the [Main Location](#).

- **Location:**  When entering the location for a sub-location, it will help you to identify it later if the **Main Location description** forms part of the **Sub-location description**.
- **Parent Location:** This field will auto populate with the Main Location you initially selected.

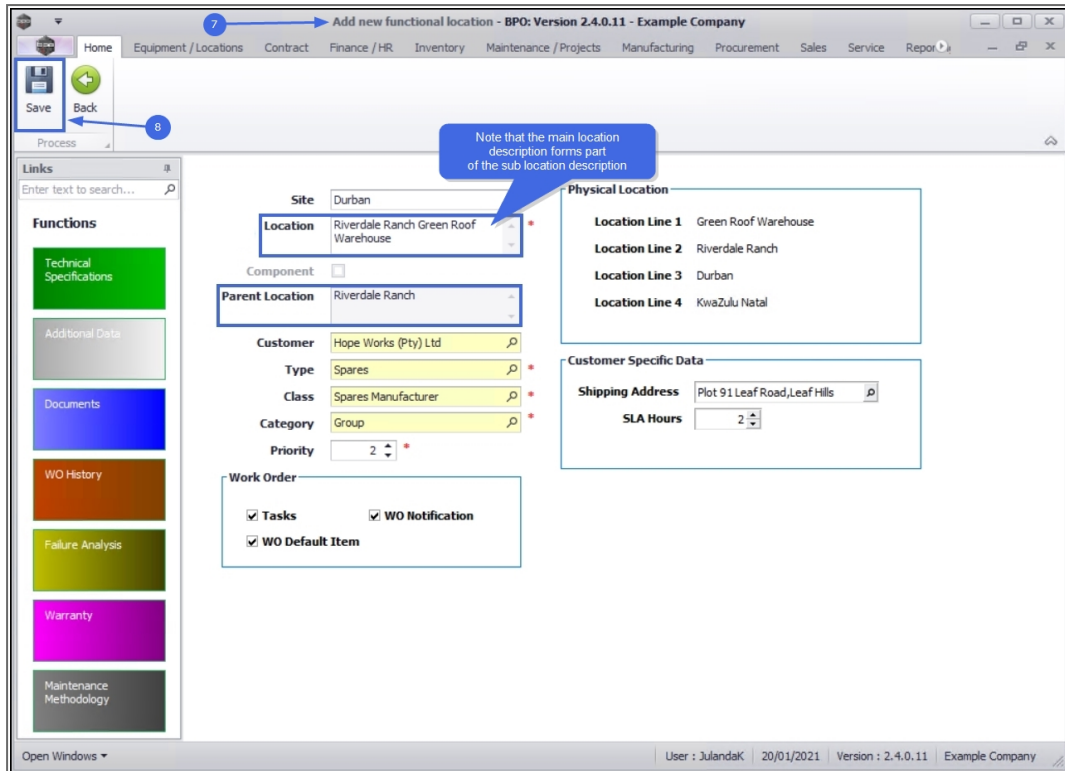
WORK ORDER

In the Work Order frame, tick the check boxes, as required:

- **Tasks:** Tasks for the location will be linked to the task instructions on the Work Order when the check box has been selected, for instance, Clean Machine. Refer to [Work Orders - Task Instructions](#)
- **WO Notification:** A Work Order notification will be sent for scheduled tasks when the check box has been selected. Refer to [Work Orders - Maintenance](#)
- **WO Default Item:** The Default settings will apply to Work Orders for this Customer location, as set out in the Work Order Management. Refer to [Introduction to Work Management](#)

SAVE SUB-LOCATION

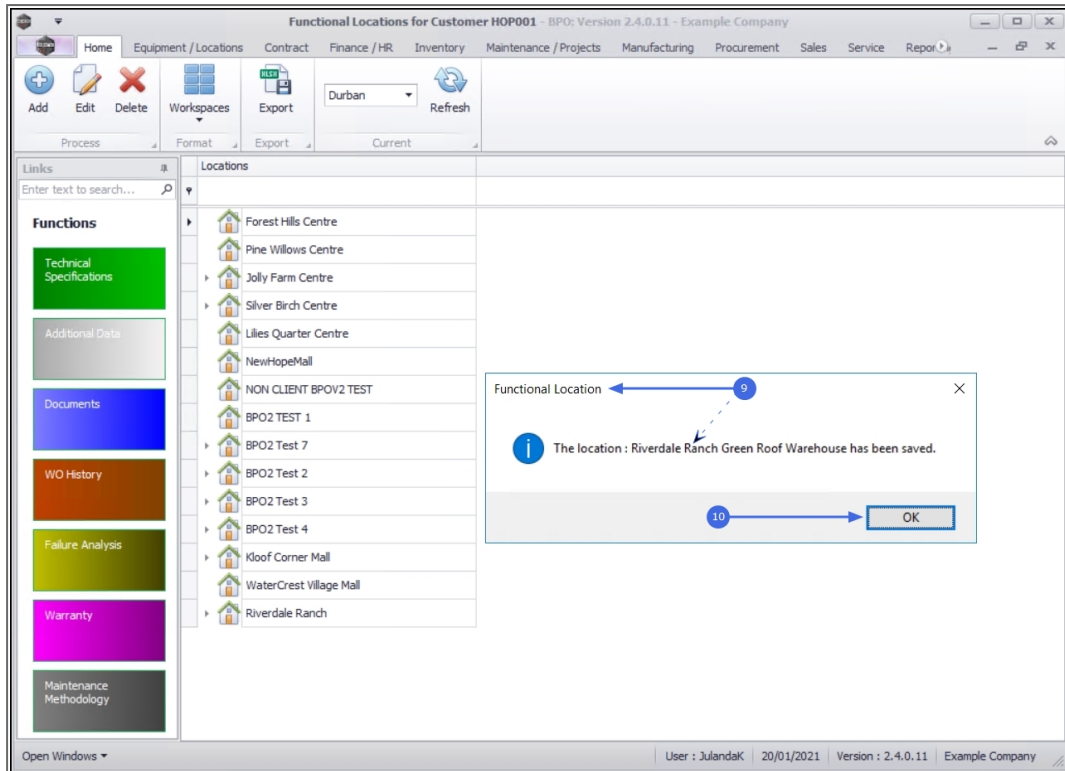
8. When you have finished updating the Sub-location details, click on **Save**.



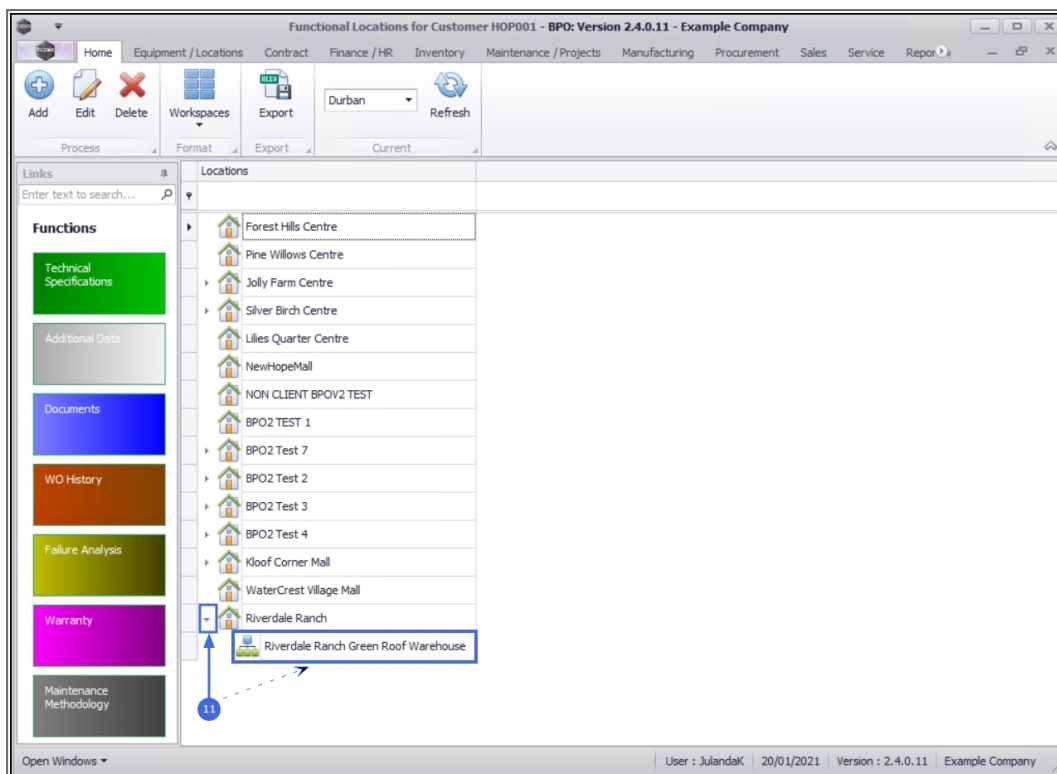
9. When you receive the **Functional Location** message to confirm that;

- **The location:** [functional sub-location name] **has been saved.**

10. Click on **OK**.



11. Click the **expand** icon next to the **Main Location** to view the **Sub-location** you have created.



Continue adding sub-locations as required, until you have your whole set up completed.

Note 1: Make sure you have selected the correct Main (Parent) Location before adding a Sub-location.

Note 2: You only need to link the Main Location, if you are going to add this location tree, to a contract.

EDIT LOCATION

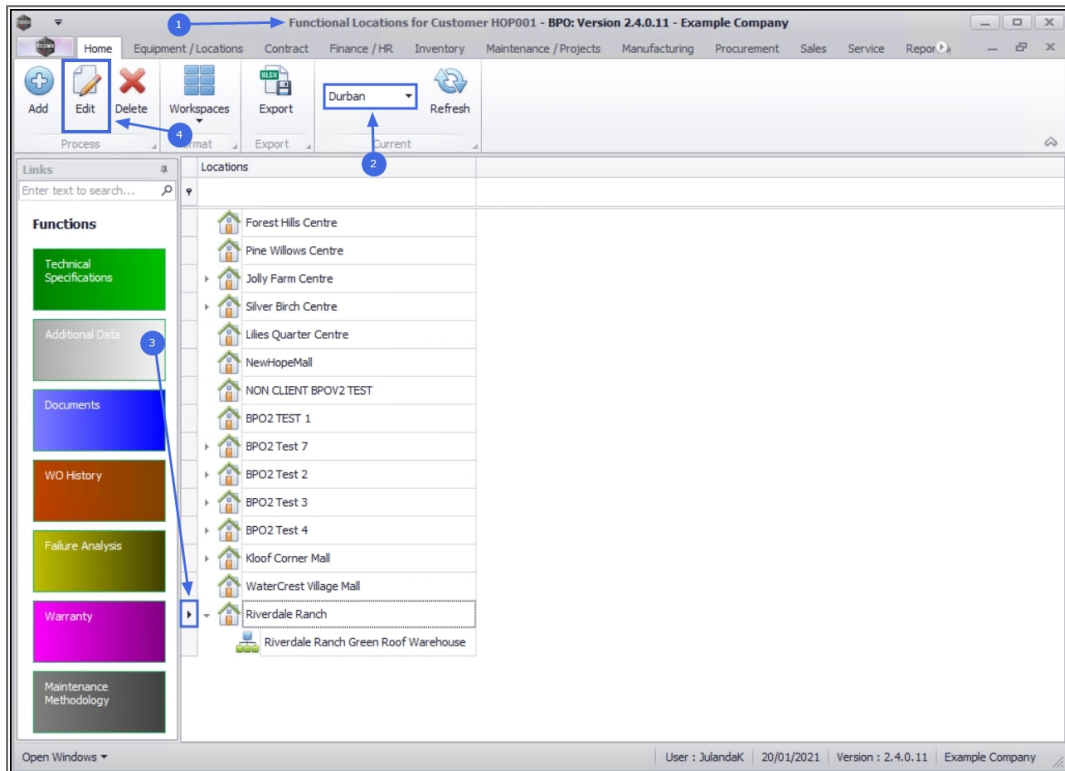
Changes can be made to a Main Location, Parent or Sub-location.

1. From the **Functional Locations for Customer** [customer code] screen,
2. Ensure that the correct **Site** has been selected.

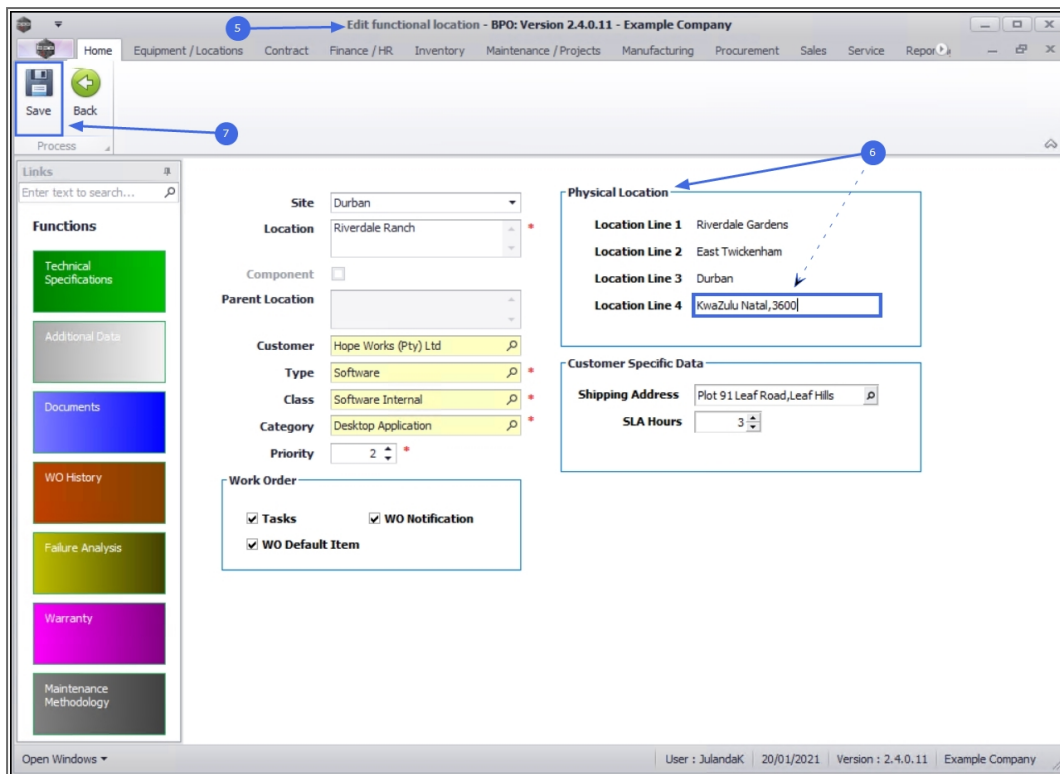
3. Select the **row** of the **Main, Parent** or **Sub-location** that you wish to **edit**.
4. Click on **Edit**.



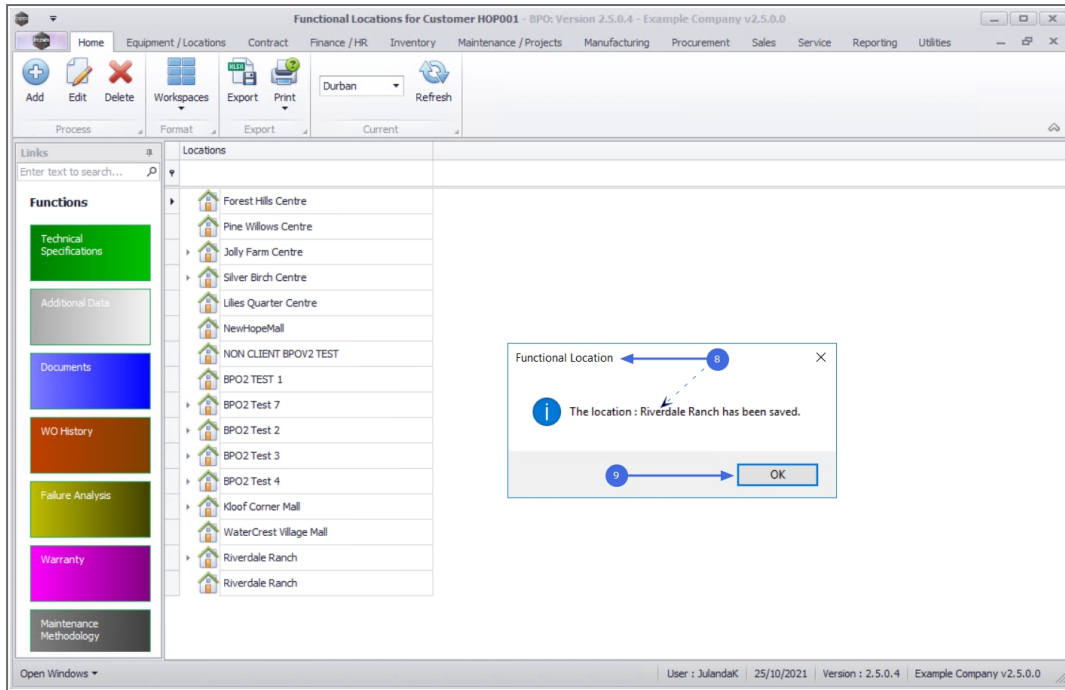
Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.



5. The **Edit functional location- [customer code]** screen will display.
6. Make the necessary changes to the location information as required.
 - The example has an addition to the Physical Location, Line 4.
7. Click on **Save** to update the Location information.



8. When you receive the **Functional Location** message to confirm;
 - **The location** : [functional location name] has been saved.
9. Click on **OK**.



DELETE LOCATION

Note that you will not be able to remove / delete a Customer Location with;

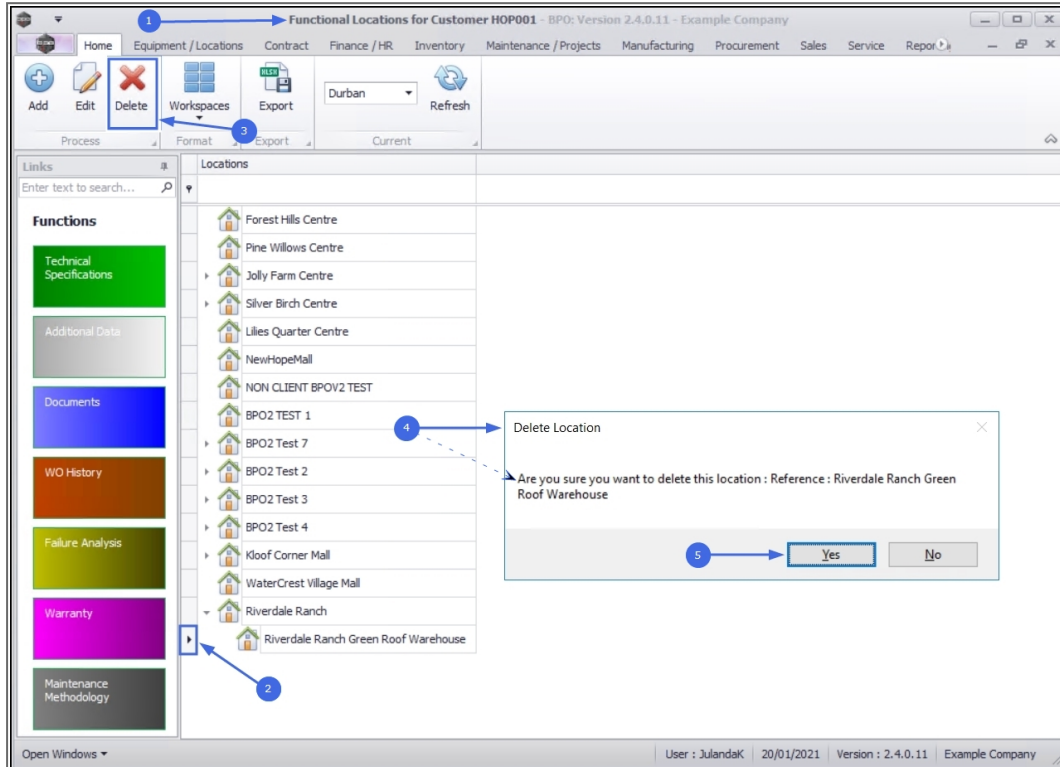
- Open Work Orders or Active Contracts linked to it.
- or a Parent Location with Sub-Locations.

1. From the **Functional Locations for Customer** [customer code] screen,
2. Select the **row** of the **Customer Location** that you wish to remove.
 - The image has **Riverdale Ranch Green Roof Warehouse** selected.
3. Click on **Delete**.



Short cut key: Right click to display the **All groups** menu list. Click on **Delete**.

4. When you receive the **Delete Location** message to confirm;
 - **Are you sure you want to delete this location:** [functional location name]
5. Click on **Yes** if you are certain about your selection.

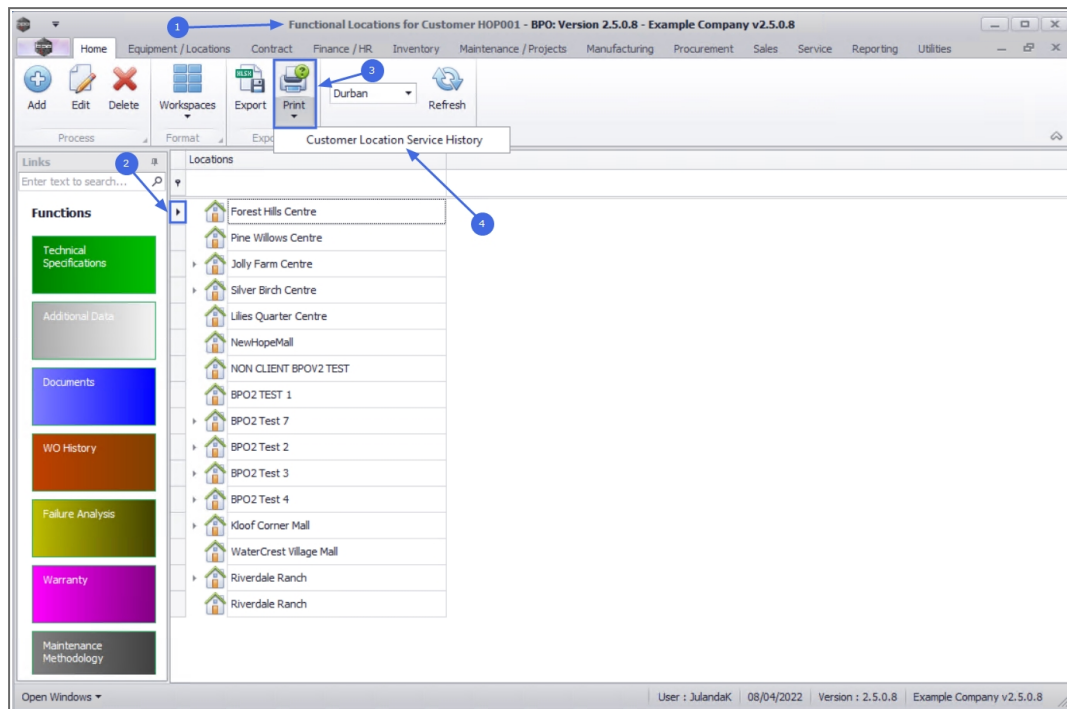


CUSTOMER LOCATION SERVICE HISTORY REPORT

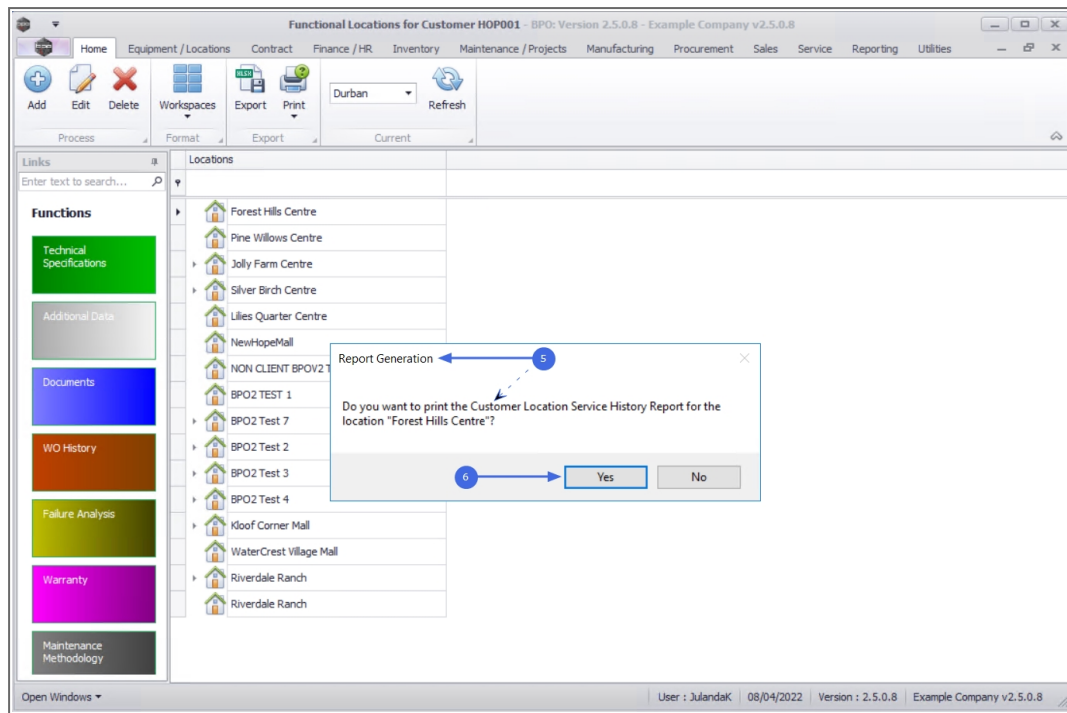
The service history report displays the activities done for a location. This report can also be generated from the Call Listing screen.  Refer to "**Calls - Functional Location Service History Report**" on page 1

1. From the **Functional Location for customer [customer code]** screen,
2. Click on the **row** of the customer location you wish to print the service history report for.

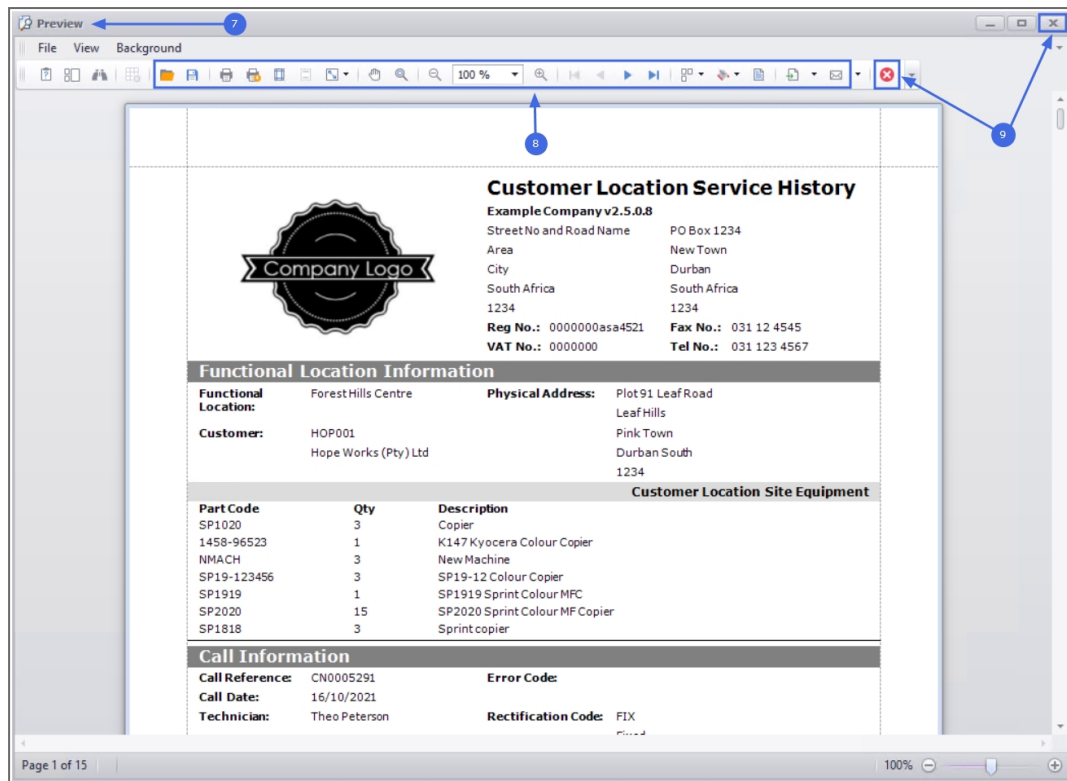
3. Click on **Print**.
4. Click on **Customer Location Service History**.



5. When you receive the **Report Generation** message to confirm;
 - Do you want to print the **Customer Location Service History Report** for location "[location name]"?
6. Click on **Yes**.



7. The Customer Location Service History Report will display in the **Report Preview** screen.
8. From this screen you can make cosmetic changes to the document, as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email** the Customer Location Service History Report.
9. Click on **Close** to return to the **Functional Location List** screen.



Customer Location Service History

Example Company v2.5.0.8

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

Functional Location Information

Functional Location: Forest Hills Centre
Physical Address: Plot 91 Leaf Road
Leaf Hills
Pink Town
Durban South
1234
Customer: HOP001
Hope Works (Pty) Ltd

Customer Location Site Equipment

Part Code	Qty	Description
SP1020	3	Copier
1458-96523	1	K147 Kyocera Colour Copier
NMACH	3	New Machine
SP19-123456	3	SP19-12 Colour Copier
SP1919	1	SP1919 Sprint Colour MFC
SP2020	15	SP2020 Sprint Colour MF Copier
SP1818	3	Sprint copier

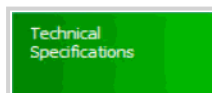
Call Information

Call Reference: CN0005291 **Error Code:**
Call Date: 16/10/2021
Technician: Theo Peterson **Rectification Code:** FIX

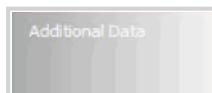
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FUNCTIONS TILES

The Customer Locations screen has its own set of **Functions** tiles that direct you to additional information related to the Customer Location.



The [Technical Specifications](#) tile directs you to technical information about the customer location. This information can include; the Number of Floors, the Building Type, Security Access, etc. Refer to [Functional Location Technical Specifications](#)

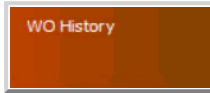


The [Additional Data](#) tile directs you to 10 additional fields where further information related to the customer location can be entered. Refer to [Functional Locations Additional Data](#)



The [Documents tile](#) directs you to a list of all the digital documents that have been linked to the customer location.

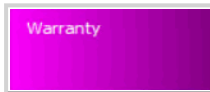
Refer to [Functional Location Documents](#)



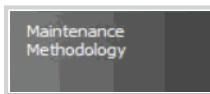
The [Work Order History tile](#) directs you to a list of all Work Orders linked to the customer location. From the Work Orders for location screen you can **Add, Edit, Delete, Close** and **Complete** a work order. Refer to [Functional Location Work Order History](#)



The [Failure Analysis tile](#) directs you to a list all the failures logged against the customer location. Refer to [Functional Location Failure Analysis](#)



The [Warranty tile](#) directs you to the Warranty for Functional Location screen. If there is a warranty linked to this customer location, the details will be displayed here. Refer to [Functional Location Warranty](#)



The [Maintenance Methodology tile](#) directs you to all the Maintenance Methodology tasks linked to the customer location, with the dates of the Last and Next Performance displayed. Refer to [Functional Location Maintenance Methodology](#)

MNU.061.018

