

## SERVICE

### CALL REQUESTS – EDIT CALL REQUEST

A **Call Request** can also be referred to as a **pre-call**. This feature is a business aid, to make a note of request(s) from a customer who is on hold, or who is over their allocated credit limit, or whose contract is on hold. No action will be taken to fix the customer issue until the customer and/or contract is no longer on hold, or the account has been settled. The call request is then converted to a **Call** and the standard call process is followed.



Refer to [Service - Introduction to Calls](#) for information related to Calls and the Call process.

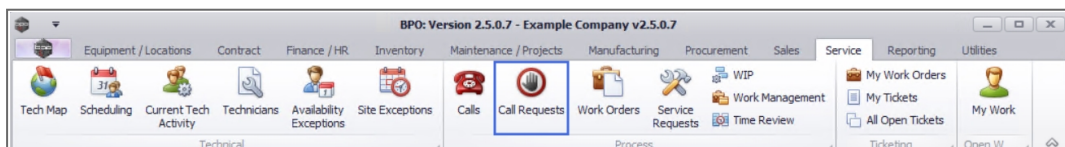
The difference between a **Call** and a **Call Request** is that with a **Call**, the corresponding action is performed by the servicing business in response to the **Call**, within the stipulated **SLA period**.



Refer to [SLA Monitor Configuration](#) for information related to the SAL period.

A **Call Request** however, only log request(s) for a customer, whose account is in arrears, who is on hold, or whose contract is on hold. No corresponding action is performed to address the request until the customer or contract is no longer on hold, or the account has been settled. The call request then gets converted to a **Call**.

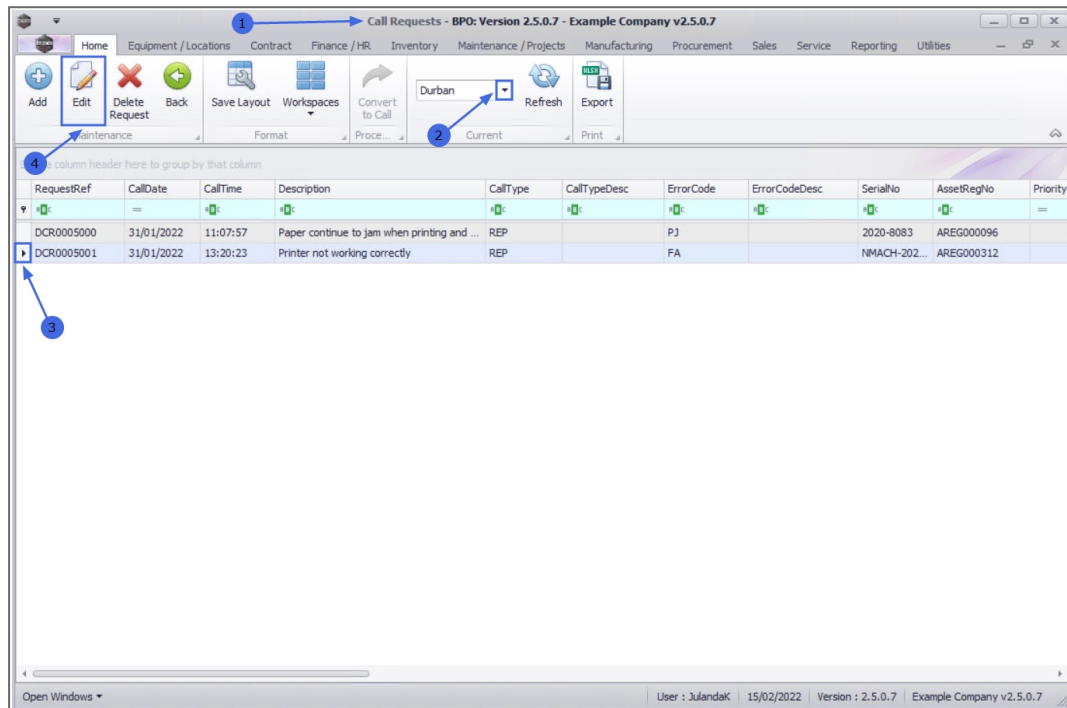
**Ribbon Access:** *Service > Call Requests*



1. The **Call Requests** listing screen will be displayed.
2. Select the **Site** where the call request was logged.
  - The example has **Durban** selected.
3. Click on the **row** of the call request you wish to edit.
4. Click on **Edit**.



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



5. The **Call Request maintenance: Request ref. - DCR[ref. number]** screen will be displayed.
6. Make the changes as required and click on **Save**.



Refer to [Call Requests - Add Call Request](#) for details on how to complete this screen.

Call Request maintenance : Request ref. - DCR0005001 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

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

Save Back Save Layout Workspaces

Customer: **lope Works (Pty) Ltd** Contact: **Henry Rowe** Contact No.: 031 555 1234 Address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

Call Type: Repair Error Code: Faulty Hardware Description: Printer not working correctly

Call Date Time: 31/01/2022 13:20:23 Priority: 3 SLA: Date Required: 31/01/2022 Order No.: Logged By: JulandaK Status: N - New Optional No.:

Relates To:

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	NMACH-2020-12345
CALL	Prior Call Reference	
CTRT	Contract No	CO0000052
FNLC	Location	
PMNG	Project Reference	
QUOT	Quote Reference	
SNV	Invoice Reference	
SORD	Order Reference	

Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
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User : JulandaK 15/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7

7. You will return to the updated **Call Requests** screen where you can view your changes.

8. Click on **Back** to exist the screen.

Call Requests - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

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

Add Edit Delete Request Back Save Layout Workspaces Convert to Call Refresh Export

Drag a column header here to group by that column

RequestRef	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	AssetRegNo	Priority
DCR0005000	31/01/2022	11:07:57	Paper continue to jam when printing and ...	REP		PJ		2020-8083	AREG000096	
DCR0005001	31/01/2022	13:20:23	Printer not working correctly	REP		FA		NMACH-202...	AREG000312	

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