

SERVICE

CALL REQUESTS - CONVERT TO CALL

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 <u>*Call*</u>, 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

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- 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 convert to a Call.
- 4. Click on *Convert to Call*.

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

Note that if the customer has <u>not</u> been released from hold, the *Convert to Call* button will be inactive (greyed out).

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Open Windows *						User : Julandak	15/02/2022	version : 2.5.0.7	Example Company v2	.5.0.1 /1

OPEN CALL

- 5. If an open call exist for the machine, you will receive an *Input Val-idation* message to confirm;
 - An open call with the following info against this machine



[Reference information].

• Are you sure you sure a new call must be added?

ADD NEW CALL

6. Click on Yes to add a new call.

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- 7. The *Call maintenance* screen will be displayed.
- 8. The Call fields will auto-populate with the information previously captured when the Call Request was logged.
- 9. Make changes to the information on the screen, if required.

Refer to the **Call Requests** - **Add Call Request** to update the call information.

10. Click on *Save* when done.



Call Requests - Convert to Call

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- 11. The Call Request will be *removed* from the Call Requests listing screen.
 - Click on *Refresh* to update the screen, if required.
- 12. Click on **Back** to exit the screen.

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VIEW CALL

Ribbon Access: Service > Call

\$ 7		BPO: Version 2.5.0.4 - Example Company v2.5.0.0	_
-	Equipment / Locations Contract Finance / HR	Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting	Utilities
Tech Map	Image: Scheduling Current Tech Activity R Technicians Scheduling Current Tech Activity R Site Exceptions	Calls Call Requests Work Orders Service Work Management Call Requests Work Orders Service Work Management Requests Time Review Time Review All Open Tickets My Work	
	Technical	Process A Ticketing A Open W	4

- 1. The *Call Listing* screen will be displayed.
- 2. The call screen will be updated and display the Call you have created.

Home Equ	upment / Location	s Contract Finar	ice / HR Inve	entory Maintenance / F	Projects Manufacturing	Procuremen	nt Sales Service Reporting I	Utilities	_ 8
dd Edit 15/0	8/2021 * 2/2022 *	Default V Refresh My Calls	Worksp	ayout 🥵 My Call baces 👻 🍇 Assign ilter 😰 Start	Close Complete Hol	d Pending	Release Print Reports		
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- Durban	28		18/01/2022	Awaiting Acceptance	Julanda Kessler	12:59:13	Replace part - current faulty	PR	Parts Re
New	21		18/01/2022	Awaiting Acceptance	Julanda Kessler	12:51:45	Printer displaying error code	REP	Repair
In Progress	: 0		18/01/2022	Awaiting Acceptance	Julanda Kessler	12:44:53	Paper keeps on jamming in machine	ITS	IT-Suppo
Hold	3		26/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	2MS - 2 month service	SM	Schedule
Complete	2	CN0005293	22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena.	SM	Schedule
Complete	0	E CN0005292	16/10/2021			08:00:00	2MS - 2 month service	SM	Schedule
	28	E CN0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Schedule
Pretoria	0	E CN0005289	08/10/2021	UnAssigned		08-00-00	BathBinMaint - Bathroom Bin Maintena	SM	Schedule
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👻 🔯 Cape Town	0		03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	. SM	Schedule
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