

SERVICE

CALLS - CUSTOMERS ON HOLD

You <u>cannot</u> log a call for a customer that is on Hold. There are a few places that will indicate whether the customer is on hold or not, when logging a call by selecting the Customer first.

Ribbon Access: Service > Calls



- 1. The *Call Listing* screen will be displayed.
- 2. Click on **Add**.

Home Eq.	ipment / Locati	ons	Contract Final	nce / HR Inv	entory Maintenance /	Projects Manufacturin	na Procureme	nt Sales Service Reporting	Itilities	
Add Edit 15/1	6/2021 • 2/2021 • 2 s	Re	Default V	Worksp Save F Forma	ayout & My Call baces • & Assign ilter & Start it & Work 4	Close Complete H	Hold Pending	Release Print Reports		
Find O F	ilter		Drag a column heade							
		- 1	CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeD
			P ====	=	80C	BC	880	* 0 :	88C	R O C
Information	No Of Calls		E CN0005298	14/12/2021	UnAssigned		10:23:41	Paper not feeding through rollers	REP	Repair
👻 🔯 Durban	38	*	E CN0005297	16/11/2021	UnAssigned		16:36:30	2MS - 2 month service	SM	Scheduled
New	36		E CN0005296	05/11/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
 In Progress 	2		E CN0005295	29/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
() Hold	0		E CN0005294	26/10/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
Pending	0		E CN0005293	22/10/2021			08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
Complete	0		E CN0005292	16/10/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
Closed	20		E CN0005292	15/10/2021	UnAssigned		08:00:00	PathPinMaint - Pathroom Pin Maintena	SM	Scheduled
- D Pretoria	0		CN0005290	09/10/2021	UnAssigned		08:00:00	PathPinMaint Pathroom Pin Maintena	CM SM	Echodulad
New	0		E CN0005289	03/10/2021	UnAssigned		08:00:00	PathPintaint - Pathreen Pin Maintena	SM SM	Scheduled
In Progress	0		E CN0005288	24/00/2021	UnAssigned		08:00:00	BathDinMaint - Bathseen Din Maintena	SIM .	Cabadulad
() Hold	0			27/09/2021	UnAssigned		08:00:00	DathbinMaint - Dathroom bin Maintena	SIM .	Cabadulad
Pending	0			17/09/2021	UnAssigned		08:00:00	bathbinMaint - bathroom bin Maintena	SIMI	Scheduled
 Complete 	0	U	E CN0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
Closed	0		E CN0005284	15/09/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
O All	0		E CN0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
👻 🖸 Cape Town	0			03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
New	0			27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
 In Progress 	0			26/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
() Hold	0			20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled
() Pending	0			17/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled
Complete	0		County 26							
Closed	0		Count: 36							
	U	Ŧ	4 C							



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

																		_
₽			3		Call ma	aintenance	BPO: Ve	rsion 2.	5.0.4 - Exan	nple Comp	oany v2.5.0.0							
Home	Equipme	ent / Locations	Contra	t Finance	e/HR	Inventory	Maintena	nce / Pro	ojects Mar	ufacturing	Procureme	nt Sales	Service	Reporting	Utilities	-	₽ x	£
	8	Q 4	2 -	6	-	A	2	1			*							
Save Back	Close C	omplete Assi	gn Hold	Pending	Release	Reinstate	Save La	yout V	vorkspaces	Print	Note							
Maintain 🦼			Proce	ss		4		Format	4	Print "	Info 🖌						\Diamond	5
Links	д]						Re	ates To : —									
Enter text to search	h ,0	C1	stomer			م	+ *		ReferenceTy	pe	Referen	eNo					darb	<u>n</u> ij
		1	Contact			م		Þ	Serial No								ē	men
Functions						-			Prior Call Ref	erence								E I
		Cor	itact No.						Call Request	Reference							C	5
Work Orders	0		Address			<i></i> م	-		Location								5	2
								-	Project Refer	ence							10	ŝ
							Ŧ	-	Quote Refer	ence			_				5	ç
Work In Progre	ess	C	all Type				• *	_	Invoice Refe	rence								ter [
			or Code				-		Order Refere	nce								Defin
			or couc				-										2	bei
Natas		Des	cription				^ *											0
notes																	Long Long	listo
							Ŧ										100	mer
		Call Da	te Time	15/12/2021	•	12:30:38	÷										100	Info
Assignments			Priority	3 🗘 *				_ Pr	ior Calls :									-
			SLA						or cons r									
			500															
Hold History		Date R	lequired	15/12/2021	•													
			Order No															
		Lo	aged By	JulandaK														
Pending Histor	у						_											
			Status	N - New														
		Opt	ional No															
On Site Info	1																	
Of Site 1110	1]																
Meters																		
Open Windows 🔻											User : Julanda	K 15/12/2	021 Vers	ion: 2.5.0.4	Example Cor	mpany v2.	5.0.0	11.

SELECTING THE CUSTOMER FIRST

- 1. Click on the *search* button in the Customer field to display the *Select a customer for this call* screen.
- 2. Use the scroll bar to *scroll* until you can view the *Status* column.
- 3. The status column will display the status of *H* for customers on *Hold*.



) ₹		Ca	all maintena	ance - BPO: Versi	on 2.5.0.4 - Example Comp	oany v2.5.0.0			_	
Home Equipme	ent / Locations Contra	ct Finance / H	R Invento	ry Maintenance	/ Projects Manufacturing	Procurement Sales	Service R	eporting Utilities	-	Ð
	Q 42 1									
ave Back Close C	complete Assign Hold	Pending Rel	ease Reins	tate Save Layou	ut Workspaces Print	Note				
Maintain 🔒	Proce	255		R	ormat 🚽 Print 🚽	Info 🔺				
nks a]				Relates To :					
iter text to search P	Customer			• + • •	ReferenceType	ReferenceNo				
Functions	Contact			🖕 * م	 Serial No Prior Call Reference 					
uncoons	Contact No.			Select a cus	stomer for this call				x	
Work Orders 0	Address		\$	Home						
				I 🥑 😏	23					
Work In Progress	Call Type			Ok Back	Save Layout					
	Error Code			Process	Format				2	
	Description									
Notes				Drag a column he						
				untNumber	AccountType	AccountTypeDesc	Status	AmendDate		
	Call Date Time	11/01/2022	▼ 14:29:	Y	a ⊡ c	R	7 R O C	-		
Assignments	Priority	3 📩 🕈		543210	CURRENT	Current Account	<u>, н</u>	27/10/2017		
	EI A	- •					A F.	01/01/100		
	SUA		_			· · · · · ·	A	3 01/1900		
Hold History	Date Required	11/01/2022	•			· · · · · · · · · · · · · · · · · · ·	A	17/09/2019		
	Order No			56987	CURRENT	Current Account	A L	14/07/2020		
	Logged By	JulandaK				,	н	27/11/2017		
Pending History	Status	N - New				1	A	22/04/2020	0	
	Optional No.						A	05/06/2019		
	- poolarito						A	01/01/1900	-	
On Site Info 1				4		2	-			
Vatare	1									
eter s										

NO CALL REQUEST REQUIRED

- 4. If you select a customer that is on hold, the *Customer Status* message will display informing you that;
 - This customer is currently on hold and no further processing can be performed. Would you like to add a call request?
- 5. Click on *No* if you do not wish to add a call request¹.

¹Additional user defined fields to classify the contract, which is viewable in the Period and Ad-hoc Escalation screens.



0 =		Call main	tenance - BPO: Vers	sion 2.5.0.4 - Example Compa	ny v2.5.0.0		_ – X
Home Equipment	nt / Locations Contra	ct Finance / HR Inv	entory Maintenand	e / Projects Manufacturing	Procurement Sales	Service Reporting	Utilities 🗕 🗗 🗙
Save Back Close Co	Omplete Assign Hold	Pending Release F	Reinstate Save Laye	out Workspaces Print	Note		
				• •			
Maintain 🖌	Proce	255		Format _ Print _ I	nfo 🔺		~
Links 4	C	Christefield Televisite Colfe	0	Relates To :			Eq
Enter text to search P	Customer	Stringfield Internet Care	J +	Reference lype	ReferenceNo		
Functions	Contact		* م	Prior Call Reference			ent
Tunctons	Contact No.			Call Request Reference		_	la l
Work Orders 0	Address		Q A	Contract No			
				Location			SLAS
			-	Project Reference		_	
Work To Progress	Call Type		•	Quote Reference		_	User
Work birriogress	currype			Order Reference		_	Def
	Error Code	Combined Status			~		ined
	Description		4		~ 1		
Notes			Ľ				Custo
		2 This custo	omer account is not a	active and no further processing	g can be) The second se
	Call Date Time	1 performed	a. would you like to	add a call request:			Internet
Assignments	Priority						
	,			Ves	No	eccription	
	SLA			10		escription	
Hold History	Date Required	11/01/2022 -			1		
	Order No						
	Lawred By	2 dan da K			5		
Pendina History	Logged by	Julandak					
	Status	N - New					
	Optional No						
On Site Info							
Off Site 100 1				1			•
Meters							
Open Windows T				110	er : Julandak 11/01/2	122 Version : 2 5 0 4	Example Company v2 5.0.0
open millions -				US	a . Julanuar 11/01/2	VCISION 2.0.0.4	Example company v2.5.0.0

- 6. You will return to the *Call maintenance* screen.
- The *Customer Info* panel will expand to display the *Telephone Number*, *Credit Status* and the *Customer Notes* for the Customer.
- 8. Click on *Notes* to add a Customer note for the Call.

Refer to "Call Details" on page 4 to add a note related to the Customer.

9. Click on *Back* to return to the *Call Listing* screen.



Calls - Customers on Hold

Home Exploment/Locations Contract Prance /HR Inventory Maintance / Projects Maintance / P
Image: Serie Back Im
Maintain Process Format Part Info Links # Process Customer Stringfield Internet Cafe P ··· + i Format Customer Info Customer Customer Stringfield Internet Cafe P ··· + i Format Customer Stringfield Internet Cafe P ··· + i Format Customer Stringfield Internet Cafe P ··· + i Format Customer Info Customer Info Customer Cafe Customer Cafe Customer Cafe Customer Cafe Stringpield Customer Cafe Stringpield Format Format Format Customer Cafe Customer Cafe Stringpield Customer Cafe Customer Cafe Stringpield Customer Cafe Stringpield Customer Cafe Stringpield Stringpield Format Format Format Cafe Cafe Stringpield Format Format Format Format Format Format Cafe Cafe Stringpield Format Format Format Customer Cafe Stringpield Format Format </th
Links a Enter text to search P Functions Contact Contact P Contact No. P Contact No. P Address 20 Johnson Rd Moryville P Work In Progress Call Type Call Date Time 11/01/2022 • Hold History Date Required Hold History Date Required Notes Date Required Prior Calls
Enter text to search Customer Stringfield Internet Cafe P ···· + I ReferenceType Customer Info : Functions Contact P ···· + I Period Reference Customer Info : Customer Info : Work Orders 0 Address 20 Johnson Rd P ···· + I Period Reference Customer Info : Work Orders 0 Address 20 Johnson Rd P ···· + I Period Reference Customer Info : Work In Progress Call Type • ··· + I Invoice Reference Contact No Invoice Reference Value Reference Notes Description • ··· + • ··· + • ··· + Prior Calls : Credit Limit 7000 30 Days: • ··· + Hold History Date Required 11/01/2022 • · • Ide second Customer Notes : • ··· + Voider Reference Cultade Cultade ··· + • ··· + • ··· + Notes Date Required 11/01/2022 • ·· + ··· + ··· + ··· + ··· + Hold History Date Required 11/01/2022 • ·· + ··· + ··· + ··· + ··· + ··· +
Functions Contact Print Call Reference Customer Code Status Work Orders 0 Address 20 Johnson Rd Print Call Reference Contact No. Work In Progress Call Type Image: Status Print Call Reference Contact No. Work In Progress Call Type Image: Status Print Call Reference Contact No. Notes Description Image: Status Print Call Status Image: Status Print Call Status Image: Status Notes Call Date Time 11/01/2022 14:29:18 Image: Status Image: Stat
Vinctoolis Contact No. Work Orders 0 Address 20 Johnson Rd Maryulie
Work Orders 0 Address 20 Johnson Rd 0 0 Work In Progress Call Type - - 0 0 0 0 Notes Description - - - 0 0 0 0 0 0 Notes Call Date Time 11/01/2022 14:29:18 -
Work In Progress Call Type Work In Progress Call Type Error Code Image: Coaton Description Image: Credit Limit for the formation of the f
Work In Progress Call Type • Work In Progress Call Type • Error Code • Invoice Reference Description • • Call Date Time 11/01/2022 • SLA • • Hold History Date Required 11/01/2022 Order Ite • • Order Ite • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • •
Work In Progress Call Type • Error Code • Description • Call Date Time 11/01/2022 Priority 3 \$ • Hold History Date Required 11/01/2022 • Call Pate Time 11/01/2022 Call Conternation • •
Notes Error Code Notes Description Call Date Time 11/01/2022 Priority 3 0 SLA SLA Hold History Date Required 11/01/2022 14:29:18 Call Date Time 11/01/2022 Call Optimity 3 0 SLA Call Calleference Calleference Calloate Control Control Outside of Limits 0.00 V V
Notes Description Assignments Priority 3 • • Frior Calls : Credit Limit 75000 Outside of Limits 0.00 30 Days: • Frior Calls : Total Outstanding 0.00 Hold History Date Required 11/01/2022 • Outer No 11/01/2022 •
Notes Description Image: Call Date Time 11/01/2022 Image: Call Date Time I
Notes Call Date Time 11/01/2022 14:29:18 Credit Status : Assignments Priority 3 0 0
Call Date Time 11/01/2022 14:29:18 Credit Limit 75000 30 Days: A Assignments Priority 3 \$* Prior Calls : Total Outstanding 0.00 ************************************
Assignments Call Date Time 11/01/2022 14:29:18 Outside of Limits 0.00 Priority 3 \$* - Total Outstanding 0.00 - Hold History Date Required 11/01/2022 - CalReference CalDate - Notes - - - - - -
Assignments Priority 3 \$* Priority 3 \$* Prior Calls: Total Outstanding 0.00 V Hold History Date Required 11/01/2022 Order No Order No
SLA Califeference Caliform Hold History Date Required 11/01/2022 Order No Order No
Hold History Date Required 11/01/2022 Order No
Hold History Date Required 11/01/2022 Hold History Order No
Order No
Logged By Julandak
Pending History Status N. New
Optional No
On Site Info
Meters
Open Windows * User : JulandaK 11/01/2022 Version : 2.5.0.4 Example Company v2.5.0.0

ADD A CALL REQUEST

A Call Request is logged to form a record of a request from a customer, whose account is in arrears, on hold or whose contract is on hold. No corresponding action will be performed to address the request until the customer or contract is no longer on hold, or the account is settled. The call request will then be converted to a Call. Refer to Call Requests - Convert to Call

- 1. If you have selected a customer that is on hold, then a *Customer Status* message will display, informing you that;
 - This customer is currently on hold and no further processing can be performed. Would you like to add a call request?
- 2. Click on **Yes** to add a call request.



Calls - Customers on Hold

• =		Call main	tenance - BPO: Versi	on 2.5.0.4 - Examp	e Company v2.5.0.0						x
Home E	quipment / Locations Contra	ct Finance / HR Inv	entory Maintenance	/ Projects Manufa	acturing Procureme	it Sales	Service	Reporting	Utilities	- 6	9 X
	9621										
Save Back Clos	se complete Assign Hold	Pending Release	save Layo	vvorkspaces	vint Note						
Maintain 🖌	Proce	SS	a B	ormat 🖌 P	rint a Info a						\Diamond
Links	4			Relates To :							
Enter text to search	ر Customer	Stringfield Internet Cafe	• + • • ۹	ReferenceType	Referen	eNo					
	Contact		* م	Serial No							nen
Functions	Contact No.			Prior Call Refere	ince		_				C In
	Contact no.			Contract No.	rerence		_				°
work Orders	Address		, q	Location			-				SL B
				Project Referen	ce						in in
				Quote Reference	e						Use
Work In Progress	Call Type		•	Invoice Referen	ce		_				200
	Error Code		•	Order Reference	e						
	Description	Contract Status 🔫	1			\times					-
Notes											CUS
		This custo	omer account is not a	ctive and no further	processing can be						
	Call Date Time	performe	d. Would you like to a	dd a call request?							
Assignments											6
	Priority					1					
	SLA		2	- Yes	No	De	escription				
Hold History	Date Required	11/01/2022 -									
	Order No.										
	order no										
Dandan Makery	Logged By	JulandaK									
Pending History	Status	N - New									
	Ontional No.										
On Site Info	1										
				•							
Meters											
Open Windows -					User : Julanda	(11/01/20	22 Version	1:2.5.0.4	Example Co	mpany v2.5.0	0.0

3. "The Call Requests Maintenance screen will be displayed." on page 2

Refer to "Call Request By Customer" on page 6 to add a Call Request for the Customer.

4. Click on *Save* to save the Call Request and to return to the *Call Listing* screen.



Home Equi	ipment / Locations Contract F	Finance / HR Inventory	Maintenance / Projects	s Manufactur	ring Procureme	ent Sales	Service Report	ing Utilities	_ 8
e Back Savela	avout Workspaces								
	*								
aintain 🖌 4	Format 4								
		_Relates To : -							
Customer Stri	ingfield Internet Cafe 🛛 🔎 … 🕂	* RefType	ReferenceTyp	pe	ReferenceNo				
Contact	Q	ASMN	Serial No						
concore	,	CALL	Prior Call Refe	erence					
Contact No.		CTRT	Contract No						
Address	م	FNLC	Location						
		PMNG	Project Refer	ence					
		QUOT	Quote Refere	ence					
C-11 T-1-1		SINV	Invoice Refer	ence					
Сантуре	•	SORD	Order Referen	nce					
Error Code	•								
Error Code		•							
Error Code		*							
Error Code		*							
Error Code		· · · · · · · · · · · · · · · · · · ·							
Error Code Description	v 15:51:17 ↓	•							
Error Code Description	01/2022 • 15:51:17 •	- Drive Calle u-							
Error Code Description Call Date Time 11/ Priority 0	v 101/2022 v [15:51:17 ↓ 0 ↓ *	Prior Calls :-	CallOsta	Califina	Darrinkon	CalTura	CollineDerr	ErrorCode	ErrorCod
Error Code Description Call Date Time 11/ Priority 0 SLA	01/2022 • 15:51:17 \$	Prior Calls :	nce CallDate	CallTime	Description	СаШтуре	CalTypeDesc	ErrorCode	ErrorCod
Error Code Description Call Date Time 11/ Priority 0 SLA Date Required 11/	v 101/2022 v 15:51:17 ↓ 101/2022 v	Prior Calls : - CallRefere	nce CaliDate	CallTime	Description	СаїТуре	CalTypeDesc	ErrorCode	ErrorCode
Call Date Time 11/ Priority 0 SLA Date Required 11/	v 101/2022 v 15:51:17 ↓ 101/2022 v 101/2022 v	• Prior Calls : - CallRefere	nce CallDate	CallTime	Description	CallType	CalTypeDesc	ErrorCode	ErrorCod
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No	v 101/2022 v 15:51:17 ↓ 0 ↓ • 101/2022 v	Prior Calls : - Calikefere	nce CalDete	CallTime	Description	CallType	CalTypeDesc	ErrorCode	ErrorCod
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No Logged By Jule	v (01/2022 v) [15:51:17 ¢ 0 ¢ € 001/2022 v andaK	Prior Cals : - CalRefere	nce CalDate	CallTime	Description	CallType	CalTypeDesc	ErrorCode	ErrorCod
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No Logged By Mathematical States C		• Prior Calls :-	nce CallDate	CalTime	Description	СаїТуре	CalTypeDesc	ErrorCode	ErrorCode
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No Logged By 3de Status N=	1/01/2022 ▼ 15:51:17 1 0 0 1 0 1 0 1 0 1 0 1 0 1 0 1 0 1 0 1 0 1	Prior Calls : -	nce CaliDate	CallTime	Description	СаїТуре	CalTypeDesc	ErrorCode	ErrorCode
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No Logged By Status N- Optional No	101/2022	Prior Cals : - CalRefere	nce CalDate	CalTime	Description	CallType	CalTypeDesc	ErrorCode	ErrorCode
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No Logged By 326 Status N- Optional No	(01/2022	Prior Calls :- CalRefere	nce CallDate	CalTime	Description	CalType	CalTypeDesc	ErrorCode	ErrorCode
Error Code Description Call Date Time 11/ Priority C SLA Date Required 11/ Order No Logged By Status N= Optional No	1/01/2022 ▼ 15:51:17	Prior Calls : -	nce CaliDate	CalTime	Description	CallType	CalTypeDesc	ErrorCode	ErrorCode

ST.122.001b