SERVICE

CALL REQUESTS - ADD A CALL REQUEST

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

The difference between a Call and a ***Call Request*** is that with a Call, the corresponding action performed by the servicing business in response to the Call must be done within the stipulated SLA period, this is because all the client's accounts are up to date.

However, a ***Call Request*** is logged to form a record of a request from a client, whose account is in arrears or is 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 in arrears is settled. The call request will then be converted to a Call.

Ribbon Access: *Service* > *Call Requests*

ADD A CALL REQUEST

- The ***Call Requests*** screen will be displayed.
- Select the relevant ***Site***.

- Click on ***Add***.

CALL REQUEST BY SERIAL NO

- The ***Call Requests Maintenance*** screen will be displayed.
- In the ***Relates To*** frame, click in the ***Serial No*** field.

- An ***Ellipse*** button will be revealed.
- Click on the ***Ellipse*** button.

- A ***Select the related equipment for this call*** screen will pop up.
- Click on the row selector in front of the ***serial no*** you wish to log a call request against.
- Click on ***Ok***.

- If there is an existing open call against the selected serial no, an ***Input Validation*** message will pop up asking you;
    - ***An open call with the following info exists against this machine: Reference no: [ ], Description: [ ], Call Type: [ ]. Are you sure you want to a new call must be added?***
- Click on ***Yes*** to continue.

The following fields will now populate depending on the ***serial no.*** you have selected.

1. **Customer:** This will populate with the customer connected to the equipment selected.
2. **Address:** This will populate with the address of the customer.
3. If the customer's account is in arrears, a ***Customer Credit Limit*** warning message will pop up telling you;
    - ***Warning: This customer's outstanding balance exceeds their credit limit. This customer has exceeded the payment terms, an outstanding balance of [ ] exists from [ ].***
4. Click on ***Ok***.

The following fields will now populate depending on the ***serial no*** you have selected.

- **Serial No:** This will populate with the serial no you selected in the previous step.
- **Contract No:** If the equipment item that you selected is on contract - the contract number will populate here . If the machine is not on contract - this will remain blank.
- Fill in all the required details.

CALL REQUEST BY CUSTOMER

- In the ***Call Request maintenance*** screen, in the ***Customer*** field, click on the ***Search*** button.

- The ***Select a customer for this call*** screen will pop up.
- Click on the ***row selector*** in front of the customer you wish to log a call equest for.
- Click on ***Ok***.

The following fields will now populate depending on the ***customer*** you have selected.

1. **Customer:** This will populate with the customer connected to the equipment selected.
2. **Address:** This will populate with the address of the customer.
3. If the customer's account is in arrears, a ***Customer Credit Limit*** warning message will pop up telling you;
    - ***Warning: This customer's outstanding balance exceeds their credit limit. This customer has exceeded the payment terms, an outstanding balance of [ ] exists from [ ].***
4. Click on ***Ok***.

- The ***Customer Info*** docking panel will automatically expand to display extra details regarding the selected customer.
- Click on the outside of the panel to collapse it and to continue logging your call request.

Call Request Details

- Click on the ***Search*** button in the ***Contact*** field.

- The ***Select a contact for this call*** screen will pop up.
- Click on the ***row selector*** in front of the contact you wish to add to this call request.
- When you have selected the contact, click on ***Ok***.

- The selected contact's info will auto populate.

- Click on the ***drop down arrow*** to reveal the ***Call Type*** menu.
- Select from the list the required call type.

- Click on the ***drop down arrow*** to reveal the ***Error Code*** menu.
- Select and click on the error code type in the menu as quoted by the customer if applicable.

- **Description:** Click in the text box and type in a description of the work to be done.

- **Call Date Time:** This will be displayed as the current date and time by default.
- **Priority:** Type in the call request priority (**1** = Most Important, **5** = Least Important).
- **Date required**: This will default to the current date. Type in or click on the drop down arrow and select an alternative date if required.
- **Order No:** Type in the Purchase Order number raised by the customer if applicable.

   - ***Note:*** This could be mandatory based on the customer contract configuration i.e. if it is specified in the contract to include Order No. then this will become a mandatory field for the particular customer.
- **Logged By:** This will auto populate with the name of the person currently logging the call request.
- **Status:** This will be set to ***N*** - New by default.
- ***Optional No:*** This field can be used for any optional reference number that the customer may wish to keep on record.

The 'Relates To' frame

If you did not select the serial no first then you need to edit this frame;

- **Serial No:** Click in the ***Reference No.*** text box.

- An ***Ellipsis*** button will be revealed.
- Click on the ***Ellipsis*** button.

- The ***Select the related equipment for this*** call screen will pop up.
   - ***Note:*** As you selected the customer first, this list will be limited to those machines linked to that customer.
- Click on the ***row selector*** in front of the equipment serial no. that you wish to add to this call request.
- Click on ***Ok***.

- If there is an existing open call against the selected serial no, an ***Input Validation*** message will pop up asking you;
    - ***An open call with the following info exists against this machine: Reference no: [ ], Description: [ ], Call Type: [ ]. Are you sure you want to a new call must be added?***
- Click on ***Yes*** to continue.

- As the ***serial number*** is selected, any other details related to the selected equipment will auto populate if available.
- In this example, the ***Contract No.*** field has been auto populated in the ***Relates To*** frame.

- If there are any ***prior calls*** linked to the selected ***serial no.***, they will be displayed in the ***Prior Calls*** frame otherwise the frame will be blank.
- Click on ***Save***.

- You will return to the ***Call Requests*** listing screen where you can now view the newly created call request.
    - ***Note:*** If the new call request is not immediately apparent in the ***Call Requests*** listing screen, click on ***Refresh***.

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