SERVICE

EDIT A CALL REQUEST

A ***Call Request*** or ***'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 has 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 until the account in arrears is settled. The ***Call Request*** will then be converted to a call.

Ribbon Access: *Service > Call Requests*

The ***Call Requests*** listing screen will be displayed.

SELECT CALL REQUEST TO EDIT

- Ensure that the ***Site*** filter is set according to your requirements.
- In this image, ***Durban*** site has been selected.

- Click on the ***row selector*** in front of the call request you wish to edit.
- Click on ***Edit***.
- Alternatively, you can ***double click*** in the row of the call request you wish to edit.

- The ***Call Request maintenance: Call ref. - [ ]*** screen will be displayed.
- Make the changes as required.
    - In this image, the ***Error Code*** will be changed.

SAVE CHANGES

- When you have finished making your changes, click on ***Save***.

- Your changes will be saved and you will return to the ***Call Requests*** listing screen.

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