SERVICE

CALLS - DELETE A CALL REQUEST

A **Call Request** or 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 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 paid, the call request can then be converted to a Call and the standard call process will be followed but if the customer cancels or the waiting time expires, the Call Request can be deleted.

Note: Its up to your company to determine when to delete Call Requests (when to set Call Request expiry periods) otherwise you could end up with a busy Call Requests screen and a user accidentally converting a request into a call when a conversion was not needed.

Ribbon Access: *Service > Call Requests*

SELECT CALL REQUEST

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

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

DELETE CALL REQUEST

- Click on the ***row selector*** in front of the call request you wish to delete.
- Click on ***Delete Request***.

- A ***Call Requests*** message will pop up asking you;
    - ***Are you sure you want to delete this call request [ ]?***
- Click on ***Yes***.

- The call request will be removed from the ***Call Requests*** listing screen.
- Click on ***Close*** to exit the screen.

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