SERVICE

CALL REQUESTS - CONVERT TO A CALL

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 settled or the contract / customer is no longer on hold, 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. In this case, 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*

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

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

SELECT CALL REQUEST

- Select the particular Call Request that you wish to convert to a Call.
- Click on ***Convert to Call***.
    - **Note:** If the customer has not been released from hold, the ***Convert to Call*** button will be inactive (greyed out).

- If there is an open call against the machine, an ***Input Validation*** message will pop up asking you;
    - ***An open call with the following info against this machine [ ]. Are you sure you sure a new call must be added?***
- The ***Call maintenance*** screen will be displayed if you click on ***Yes***.

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

- The Call fields will be auto-populated with information previously captured when the Call Request was logged.
- Make changes if required. Refer to the add a new call manual for more information.
- Click on ***Save***.

- The Call Request will be ***removed*** from the Call Requests listing screen.

- If the Call Request remains on the screen after the conversion, click on ***Refresh***.

VIEW GENERATED CALL

Ribbon Access: *Service > Calls*

- The ***Call Listing*** screen will be displayed.
- From this screen, you can now view the newly created Call.

MNU.122.049