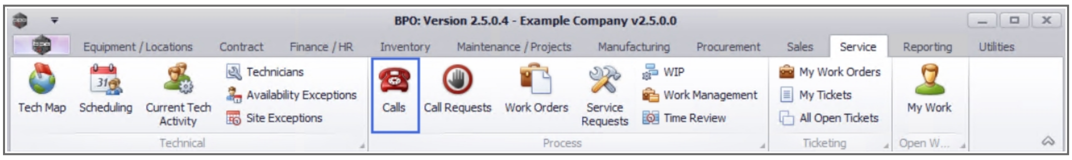
SERVICE

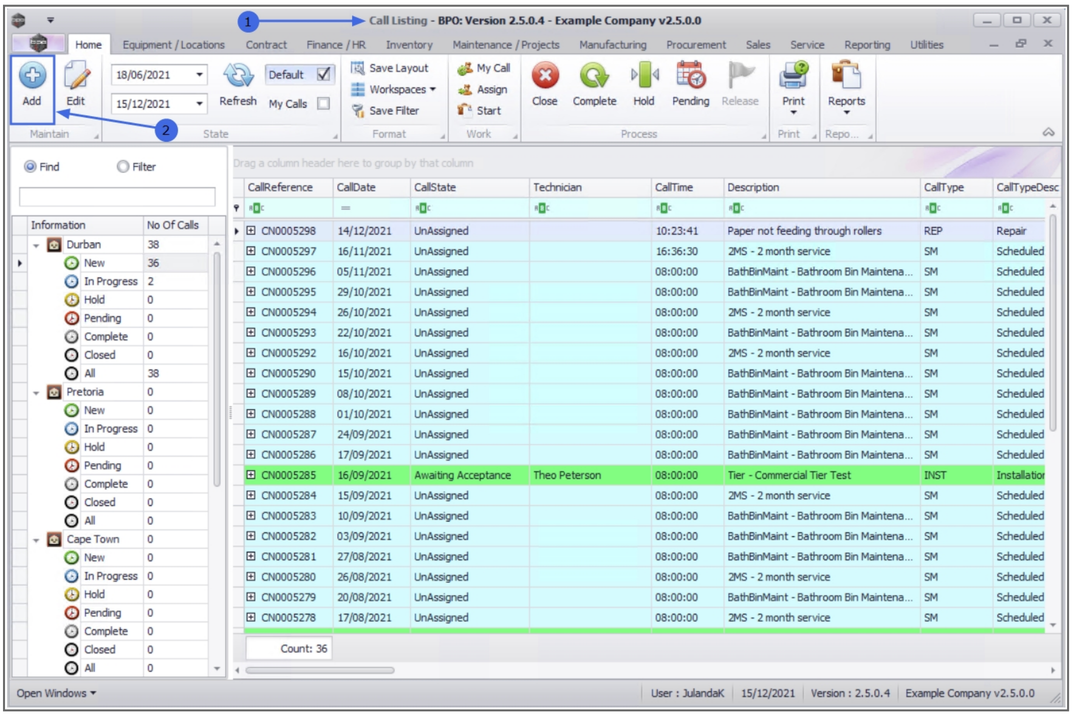
CALLS - CUSTOMERS ON HOLD

You cannot 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.

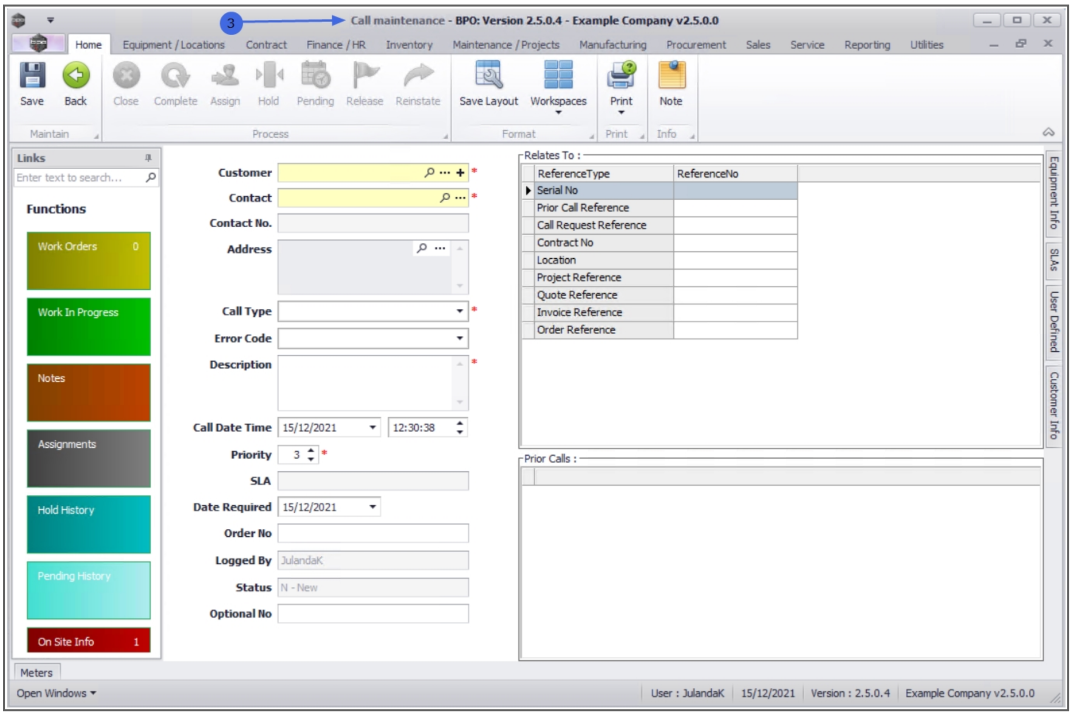
Ribbon Access: *Service > Calls*



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

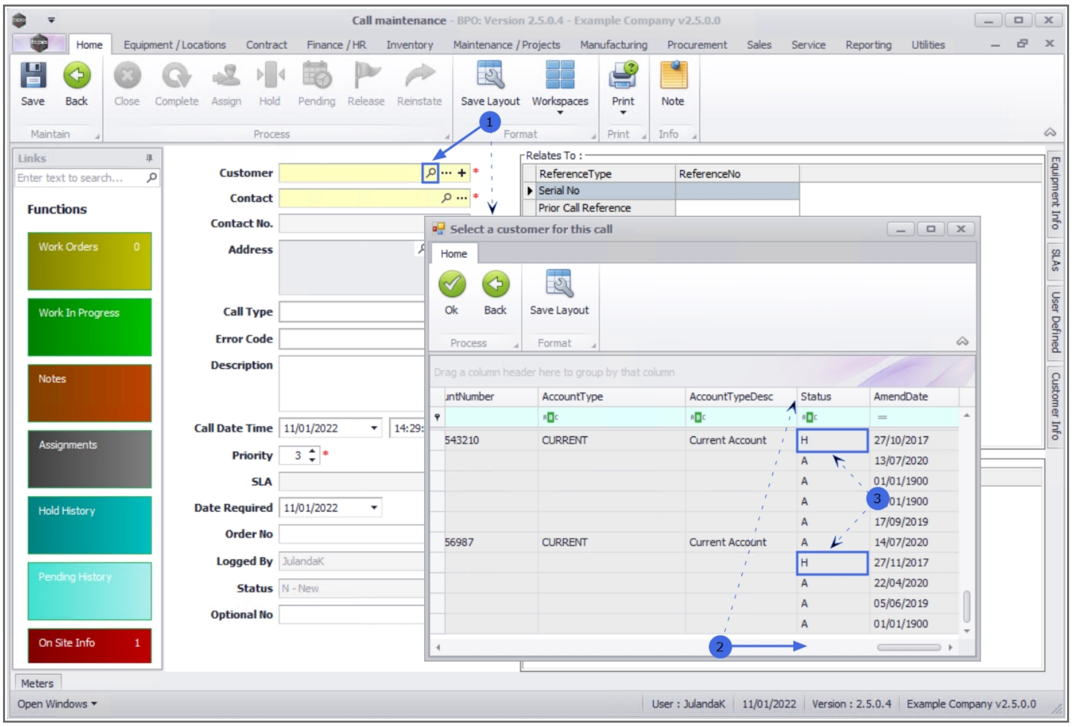


3. The ***Call maintenance*** screen will be displayed.



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***.



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 request[1].

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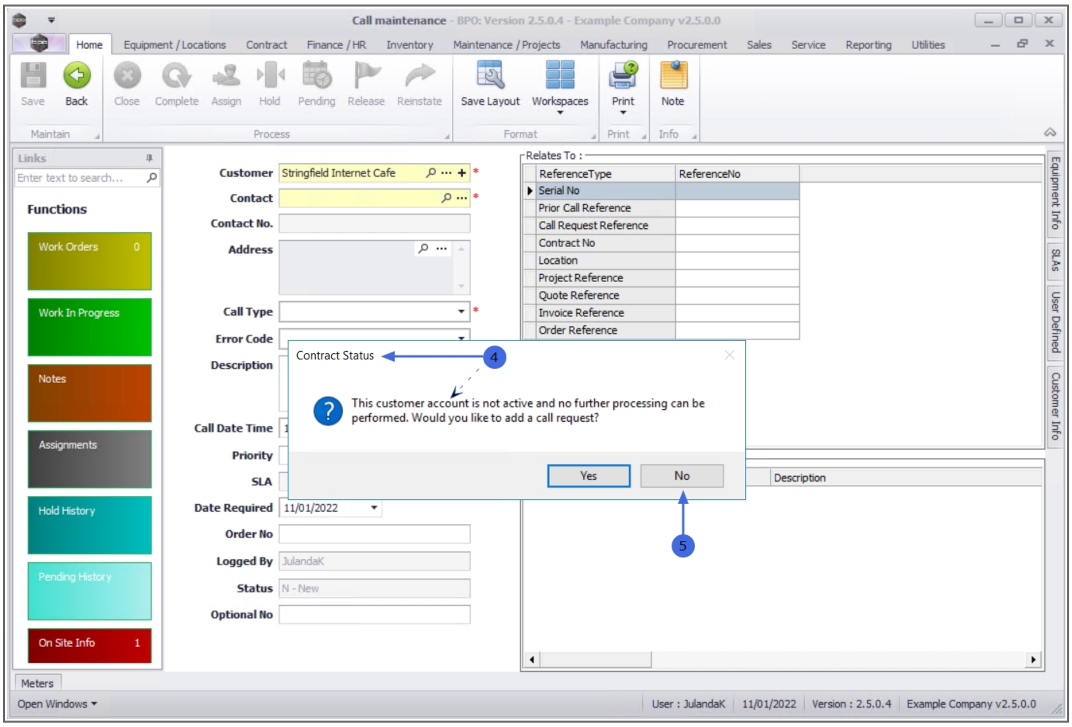
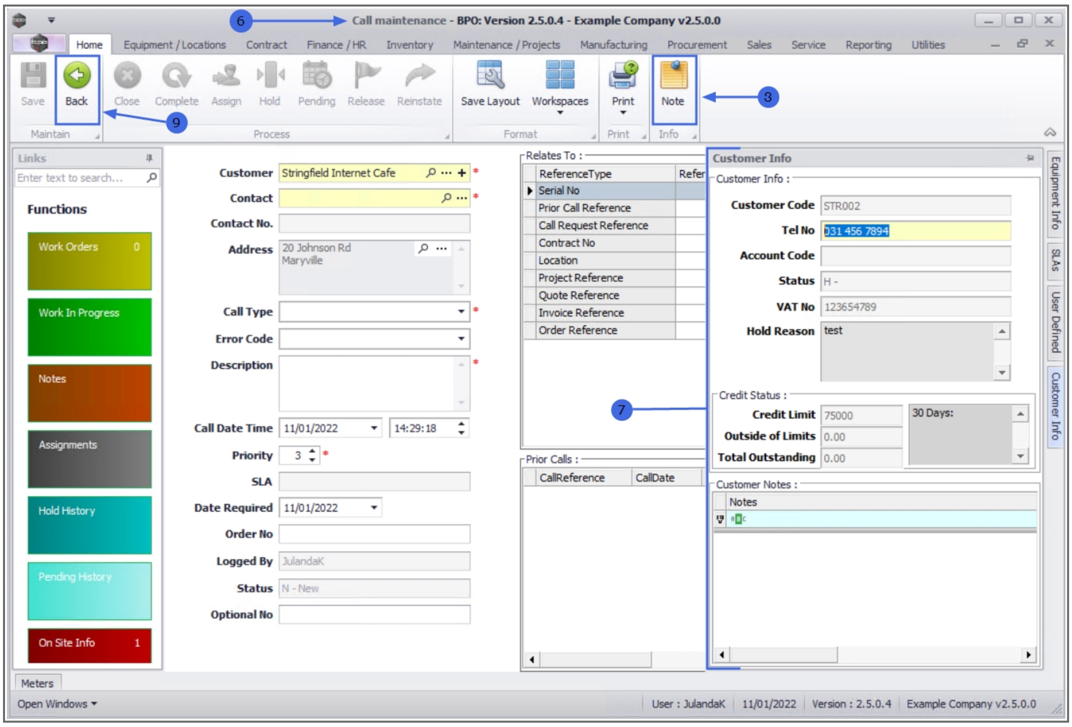
[1]Additional user defined fields to classify the contract, which is viewable in the Period and Ad-hoc Escalation screens.



6. You will return to the ***Call maintenance*** screen.
7. 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 "Add Customer Note" on page 4 to add a note related to the Customer.

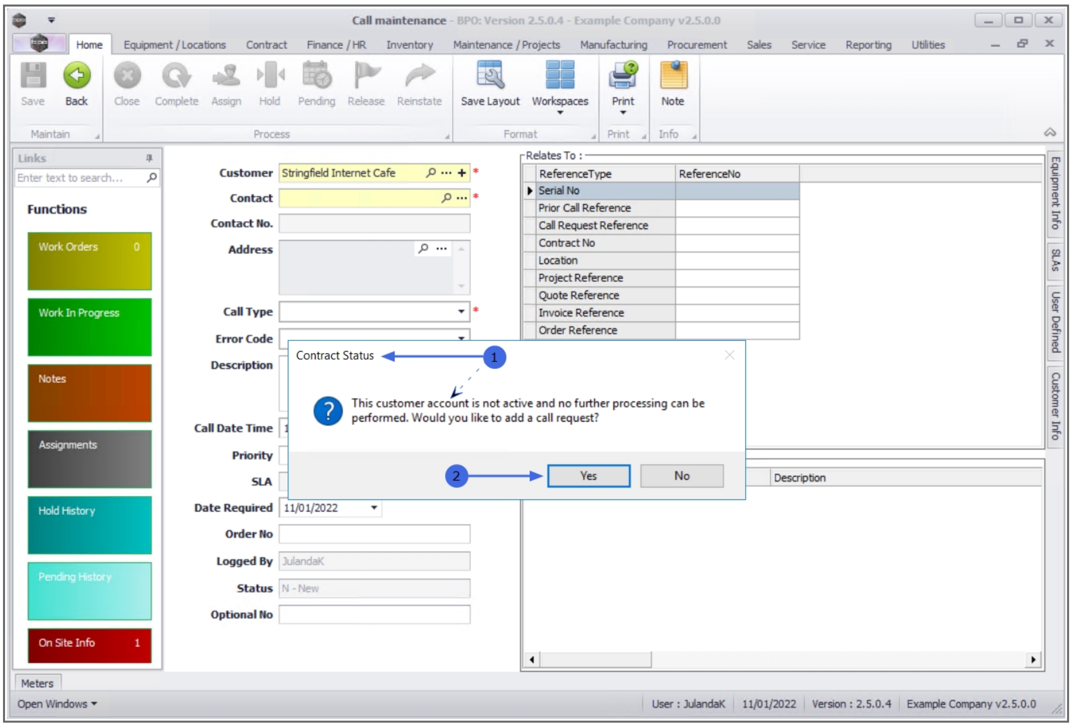
9. Click on ***Back*** to return to the ***Call Listing*** screen.



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

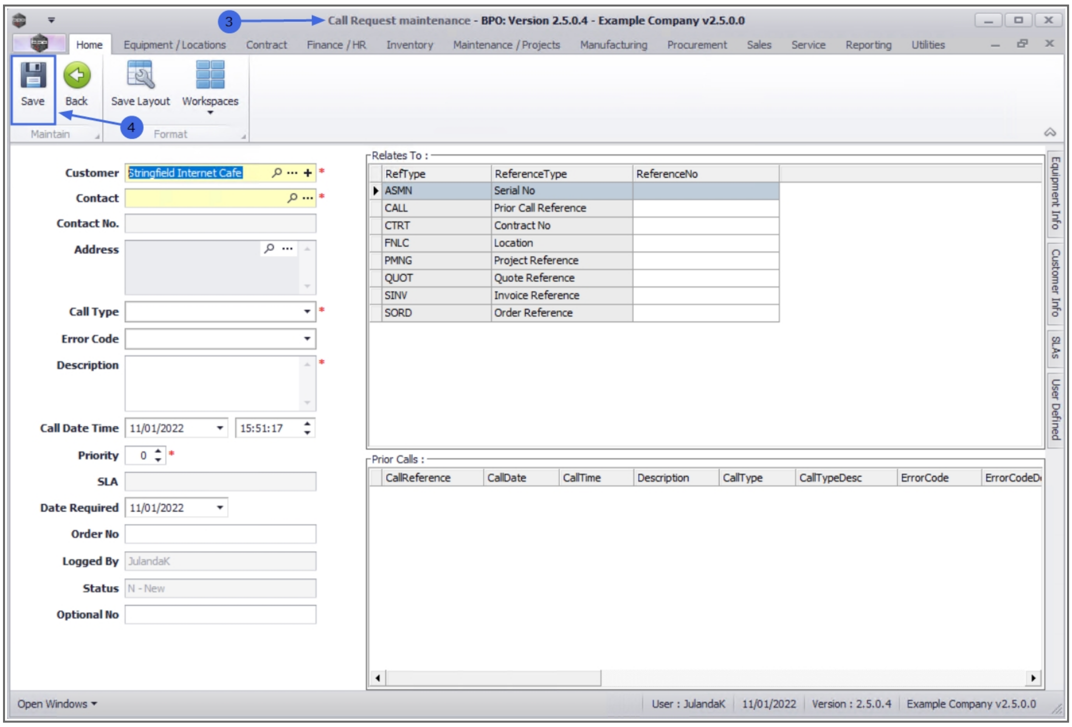
1. If you have selected a customer that is on hold, then a ***Customer Status*** message will display, informing you that;
    - ***This customer is currently on hold and no further processing can be performed. Would you like to add a call request?***
2. Click on ***Yes*** to add a call request.



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.


Call Request maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0
3
4
Home
Equipment / Locations
Contract
Finance / HR
Inventory
Maintenance / Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Maintain
Format
Customer
Stringfield Internet Cafe
Contact
Contact No.
Address
Call Type
Error Code
Description
Call Date Time
11/01/2022
15:51:17
Priority
0
SLA
Date Required
11/01/2022
Order No
Logged By
JulandaK
Status
N - New
Optional No
Relates To :
RefType
ReferenceType
ReferenceNo
ASMN
Serial No
CALL
Prior Call Reference
CTRT
Contract No
FNLC
Location
PMNG
Project Reference
QUOT
Quote Reference
SINV
Invoice Reference
SORD
Order Reference
Prior Calls :
CallReference
CallDate
CallTime
Description
CallType
CallTypeDesc
ErrorCode
Equipment Info
Customer Info
SLAs
User Defined
Open Windows
User : JulandaK
11/01/2022
Version : 2.5.0.4
Example Company v2.5.0.0

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