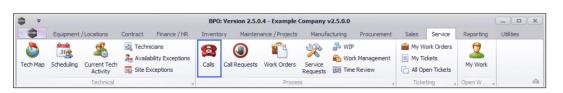


# SERVICE

## **CALLS - CUSTOMERS ON HOLD**

You <u>cannot</u> 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**.

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

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### **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*.



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#### **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<sup>1</sup>.

<sup>&</sup>lt;sup>1</sup>Additional user defined fields to classify the contract, which is viewable in the Period and Ad-hoc Escalation screens.



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- 6. You will return to the *Call maintenance* screen.
- 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.



#### Calls - Customers on Hold

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#### 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.



#### Calls - Customers on Hold

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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.



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