We are currently updating our site; thank you for your patience.

SERVICE

CALL REQUESTS – CONVERT TO CALL

A ***Call Request*** can also be referred to as a ***pre-call***. This feature is a business aid, to make a note of request(s) from a customer who is on hold, or who is over their allocated credit limit, or whose contract is on hold. No action will be taken to fix the customer issue until the customer and/or contract is no longer on hold, or the account has been settled. The call request is then converted to a **Call** and the standard call process is followed.

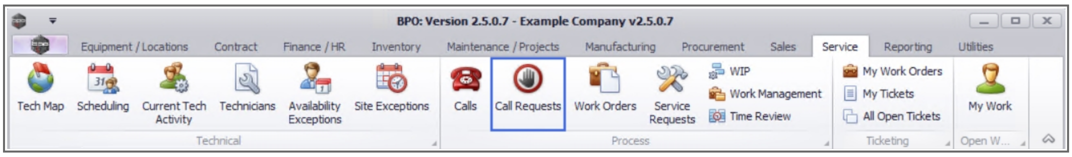
Refer to Service - Introduction to Calls for information related to Calls and the Call process.

The difference between a **Call** and a ***Call Request*** is that with a **Call**, the corresponding action is performed by the servicing business in response to the **Call**, within the stipulated **SLA period**.

Refer to SLA Monitor Configuration for information related to the SAL period.

A ***Call Request*** however, only log request(s) for a customer, whose account is in arrears, who is on hold, or whose contract is on hold. No corresponding action is performed to address the request until the customer or contract is no longer on hold, or the account has been settled. The call request then gets converted to a **Call**.

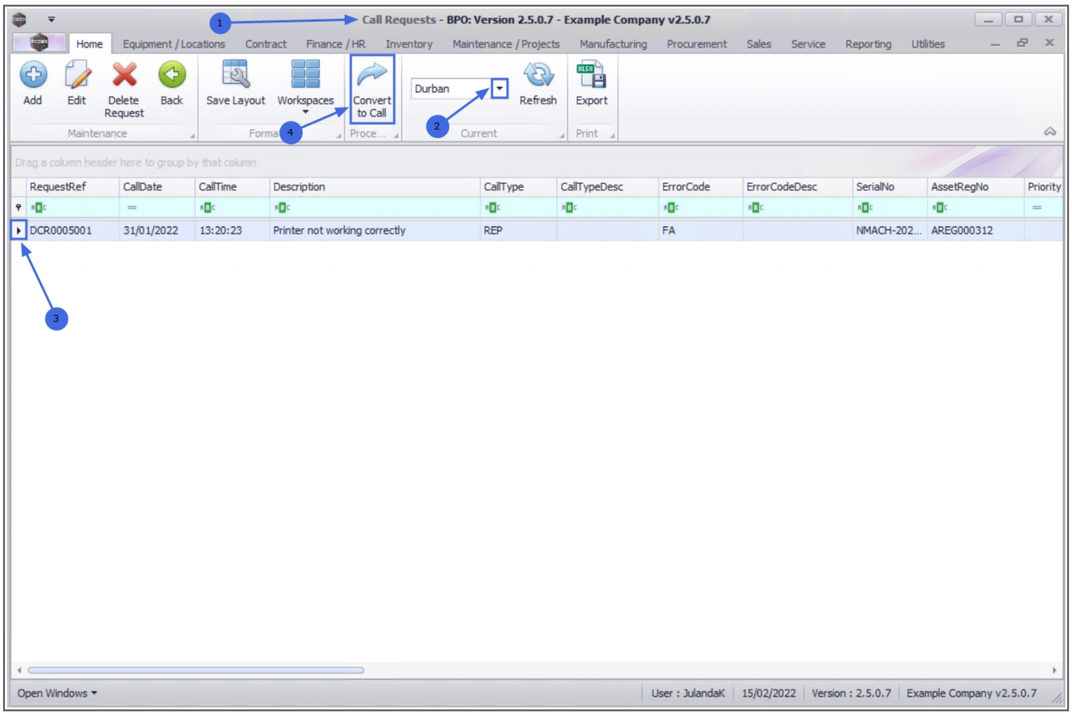
Ribbon Access: Service > Call Requests



1. The ***Call Requests*** listing screen will be displayed.
2. Select the ***Site*** where the call request was logged.
    - The example has ***Durban*** selected.
3. Click on the ***row*** of the call request you wish to convert to a Call.
4. Click on ***Convert to Call***.

Short cut key: Right click to display the **Process** menu list. Click on **Convert**.

Note that if the customer has not been released from hold, the **Convert to Call** button will be inactive (greyed out).

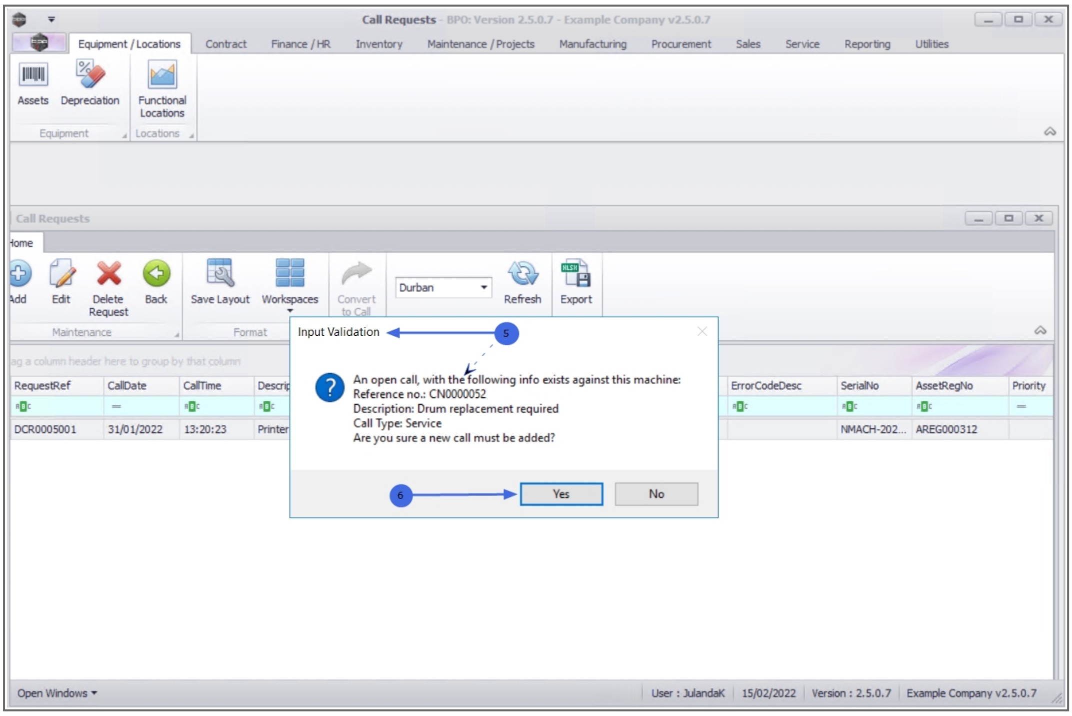


OPEN CALL

5. If an open call exist for the machine, you will receive an **Input Validation** message to confirm;
    - **An open call with the following info against this machine** [Reference information]**.**
    - **Are you sure you sure a new call must be added?**

ADD NEW CALL

6. Click on **Yes** to add a new call.

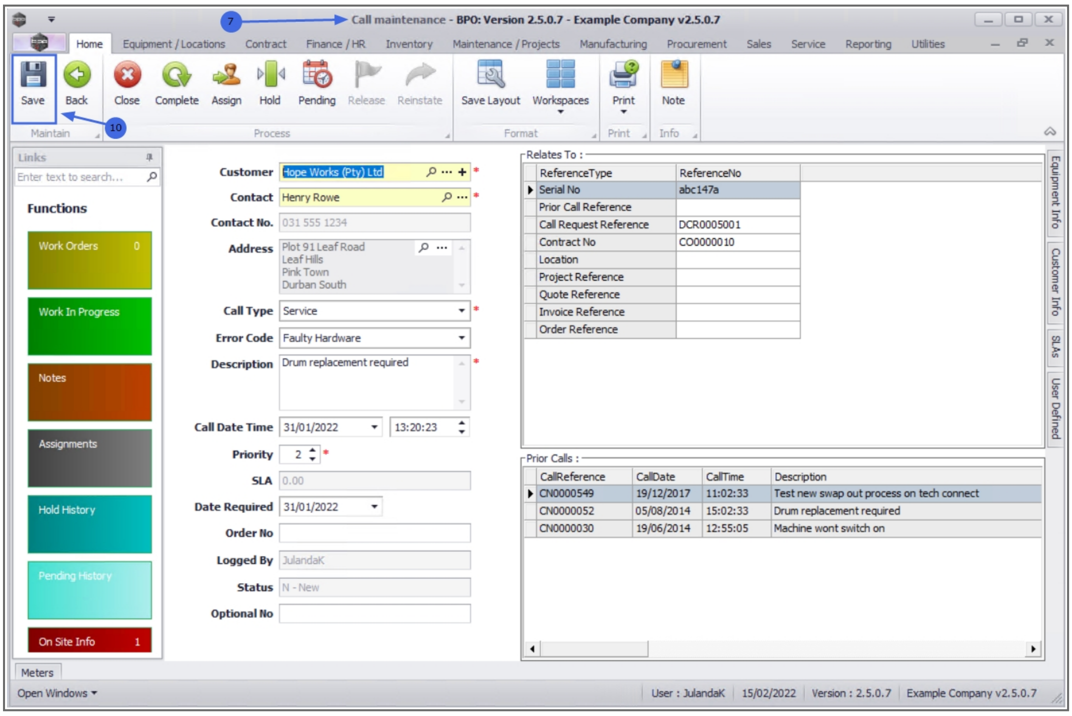


7. The **Call maintenance** screen will be displayed.
8. The Call fields will auto-populate with the information previously captured when the Call Request was logged.

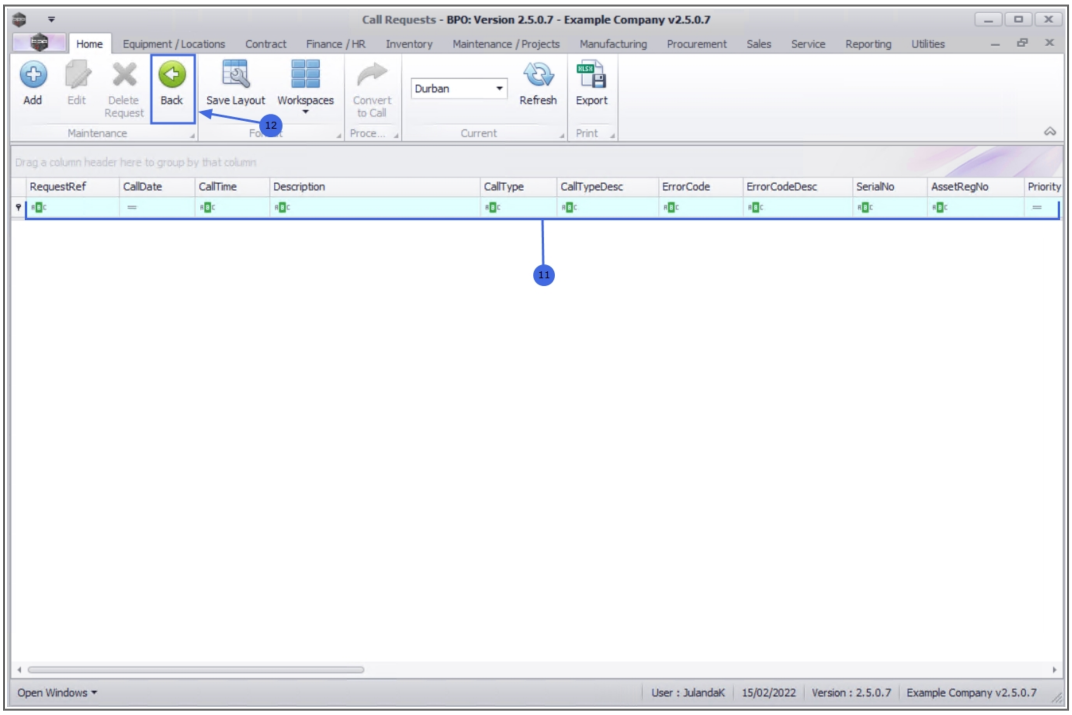
9. Make changes to the information on the screen, if required.

> Refer to the Call Requests - Add Call Request to update the call information.

10. Click on **Save** when done.

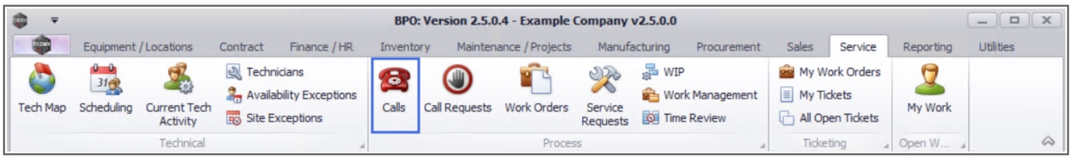


11. The Call Request will be **removed** from the Call Requests listing screen.
    - Click on **Refresh** to update the screen, if required.
12. Click on **Back** to exit the screen.

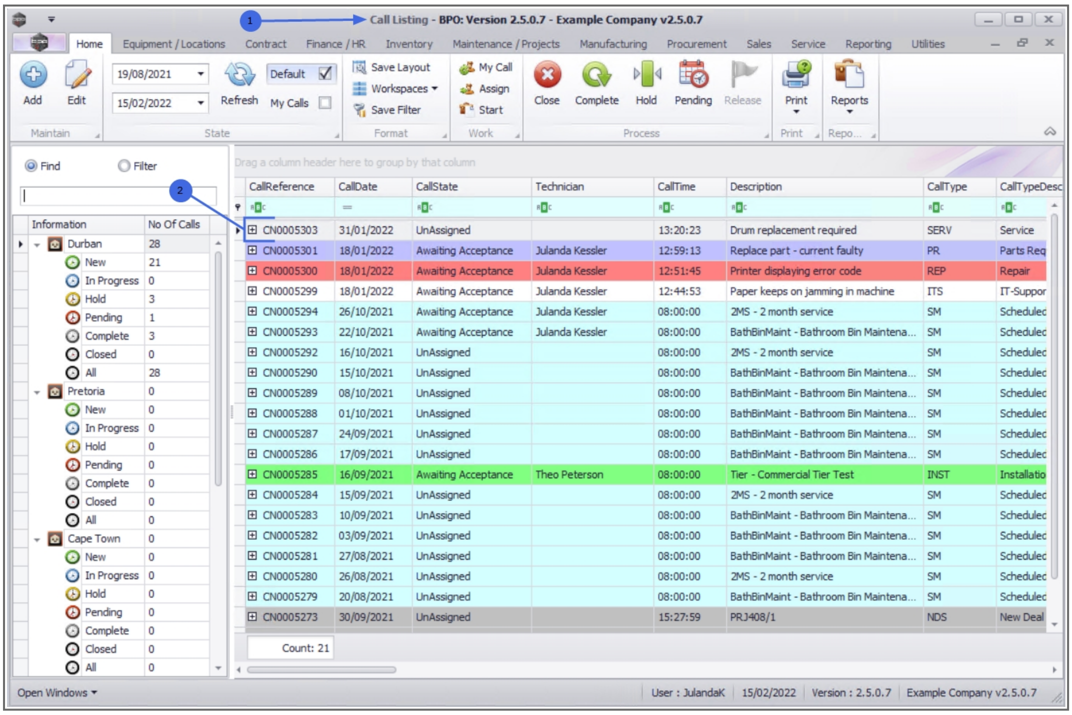


VIEW CALL

Ribbon Access: Service > Call



1. The **Call Listing** screen will be displayed.
2. The call screen will be updated and display the Call you have created.


Call Listing - BPO: Version 2.5.0.7 - Example Company v2.5.0.7
Home
Equipment / Locations
Contract
Finance / HR
Inventory
Maintenance / Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Add
Edit
19/08/2021
15/02/2022
Refresh
Default
My Calls
Save Layout
Workspaces
Save Filter
My Call
Assign
Start
Close
Complete
Hold
Pending
Release
Print
Reports
Maintain
State
Format
Work
Process
Print
Repo...
Find
Filter
Information
No Of Calls
Durban 28
New 21
In Progress 0
Hold 3
Pending 1
Complete 3
Closed 0
All 28
Pretoria 0
Cape Town 0
Drag a column header here to group by that column
CallReference
CallDate
CallState
Technician
CallTime
Description
CallType
CallTypeDesc
CN0005303 31/01/2022 UnAssigned 13:20:23 Drum replacement required SERV Service
CN0005301 18/01/2022 Awaiting Acceptance Julanda Kessler 12:59:13 Replace part - current faulty PR Parts Req
CN0005300 18/01/2022 Awaiting Acceptance Julanda Kessler 12:51:45 Printer displaying error code REP Repair
CN0005299 18/01/2022 Awaiting Acceptance Julanda Kessler 12:44:53 Paper keeps on jamming in machine ITS IT-Suppor
CN0005294 26/10/2021 Awaiting Acceptance Julanda Kessler 08:00:00 2MS - 2 month service SM Scheduled
CN0005285 16/09/2021 Awaiting Acceptance Theo Peterson 08:00:00 Tier - Commercial Tier Test INST Installatio
CN0005273 30/09/2021 UnAssigned 15:27:59 PRJ408/1 NDS New Deal
Count: 21
Open Windows
User : JulandaK
15/02/2022
Version : 2.5.0.7
Example Company v2.5.0.7

MNU.122.049