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

SERVICE

CALL REQUESTS - ADD CALL REQUEST

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.

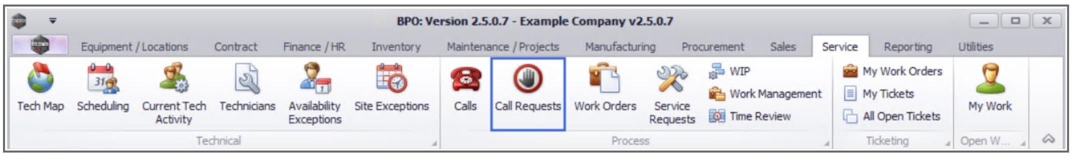
Refer to Service - Introduction to Calls for information related to Calls and the Call process.

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.

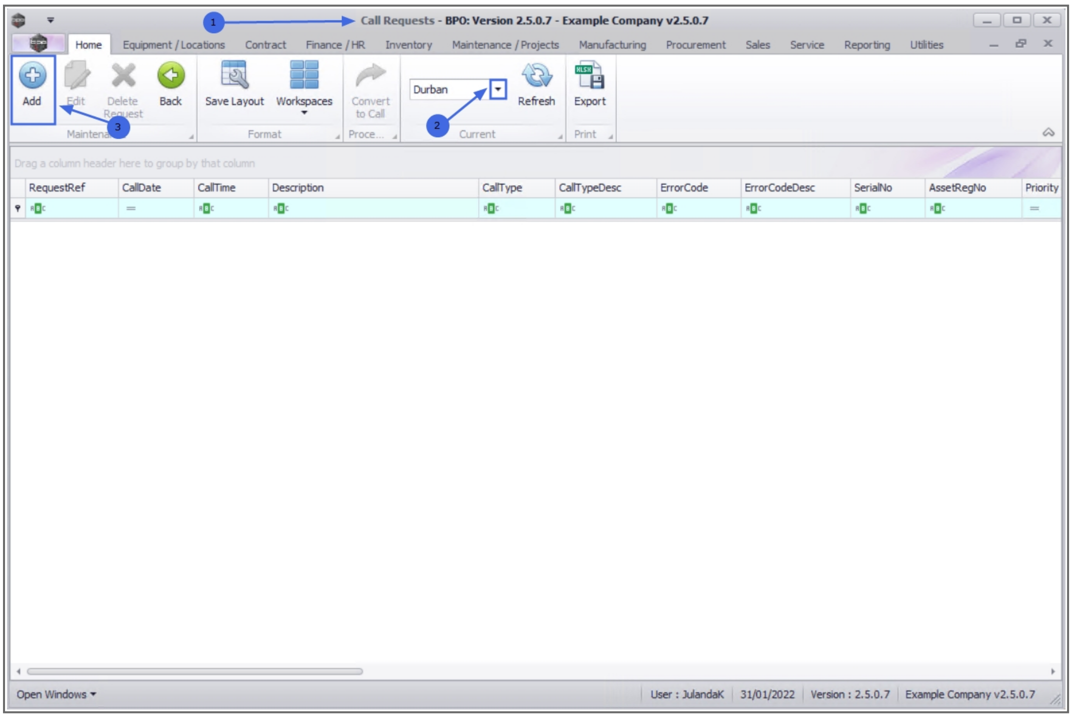
A ***Call Request*** however, only log request(s) for a customer, with an account in arrears, who has been placed on hold, or whose contract is on hold. No corresponding action is performed to address the request until the customer or contract is no longer on hold, or the account has been settled. The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

Ribbon Access: Service > Call Requests



1. The ***Call Requests*** screen will be displayed.
2. Select the ***Site*** where the call request needs to be created.
3. Click on **Add**.

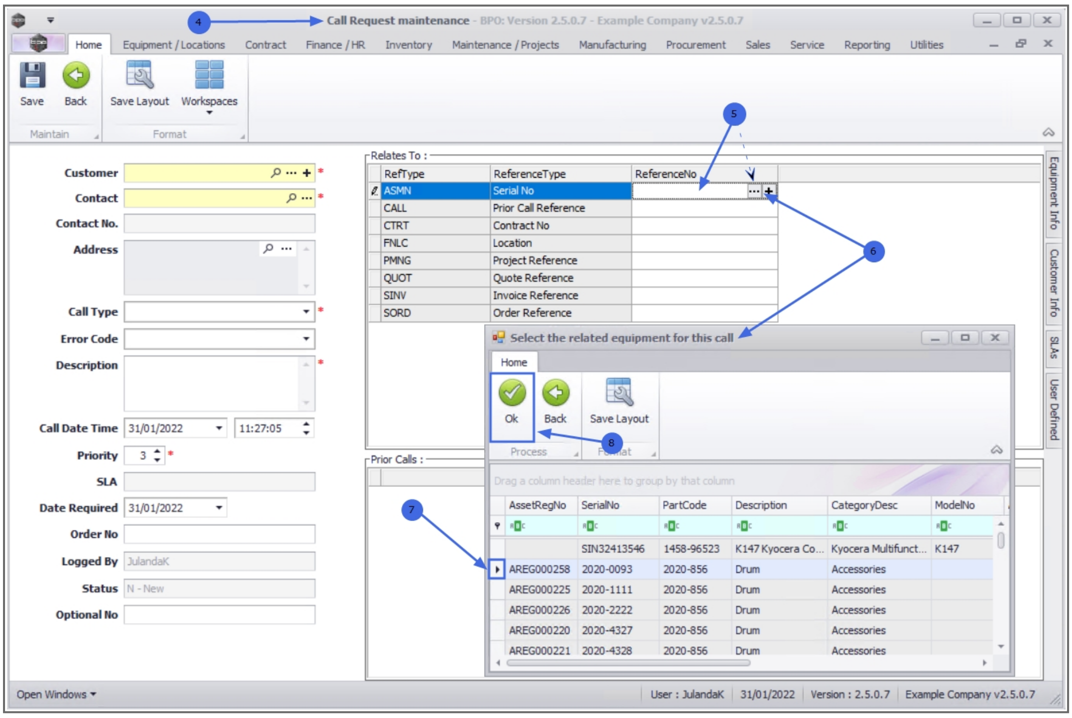
Short cut key: Right click to display the **Process** menu list. Click on **Add**.



CALL REQUEST BY SERIAL NO

4. The ***Call Requests Maintenance*** screen will be displayed.
5. In the ***Relates To*** frame, click in the ***Serial No*** field to display the ***ellipses*** button.
6. When you click on the ellipses button the ***Select the related equipment for this call*** screen will be displayed.

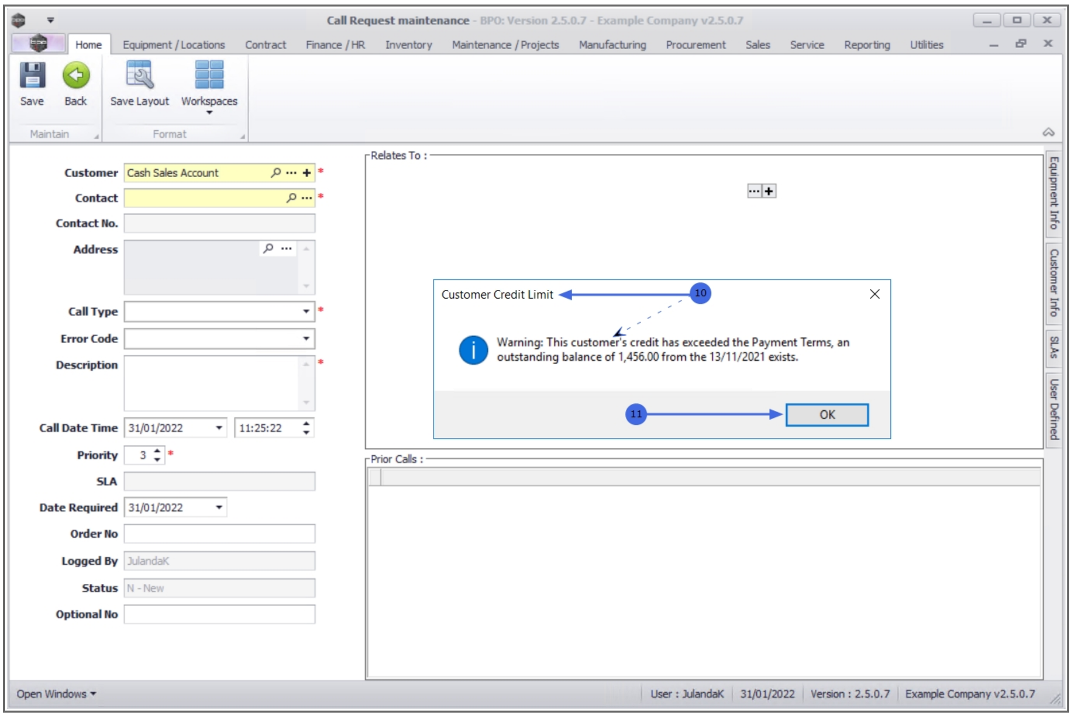
7. Click on the row of the ***serial no*** you wish to log a call request against.
8. Click on *OK*.



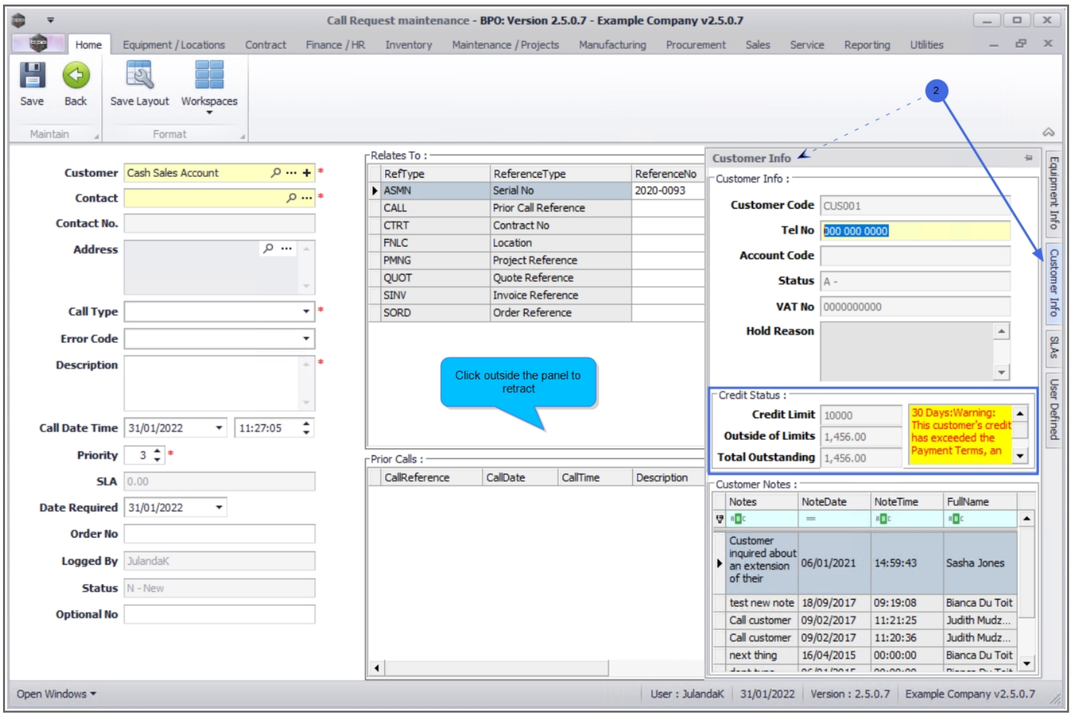
9. The **Call Request Maintenance** screen will be populated with the Customer information linked to the Serial Number.

CUSTOMER CREDIT LIMIT

10. If the customer's account is in arrears, the ***Customer Credit Limit*** message will display to inform you;
    - **Warning: This customer's credit has exceeded the Payment Terms, an outstanding balance of [**amount**] from the [**date**] exists.**
11. Click on **OK**.

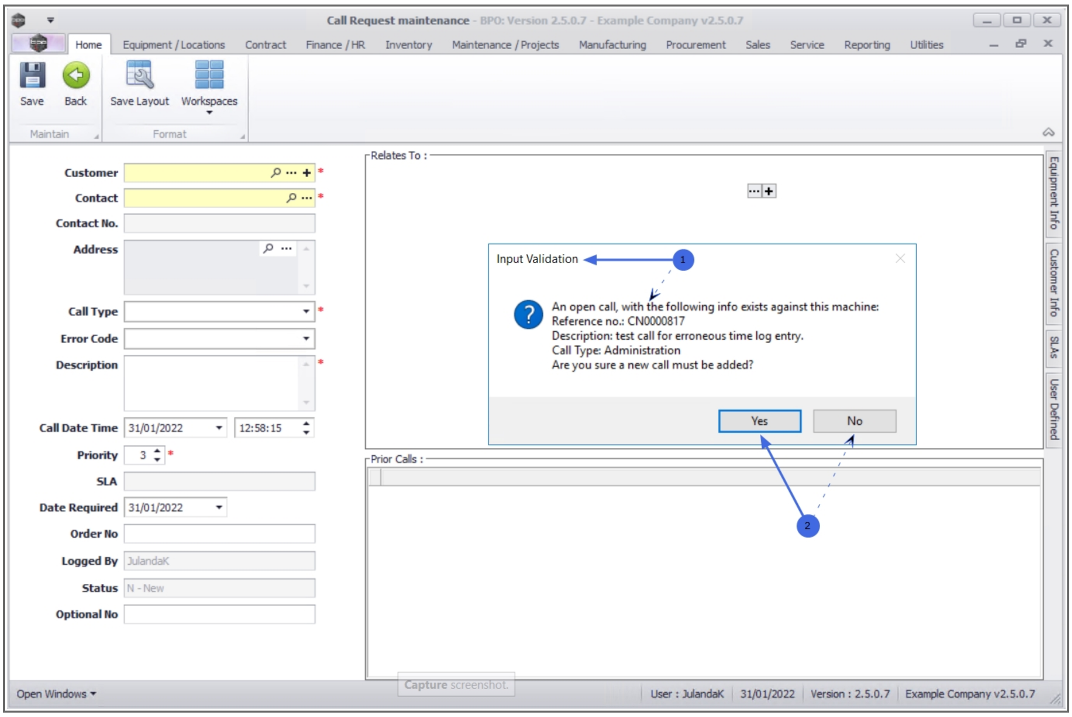


12. Click on the ***Customer Info*** tab to display the Customer Info frame where you can view the **Credit Status** for the customer.
13. Click outside the panel to retract the frame and to continue logging the "Call Request Details" on page 7.



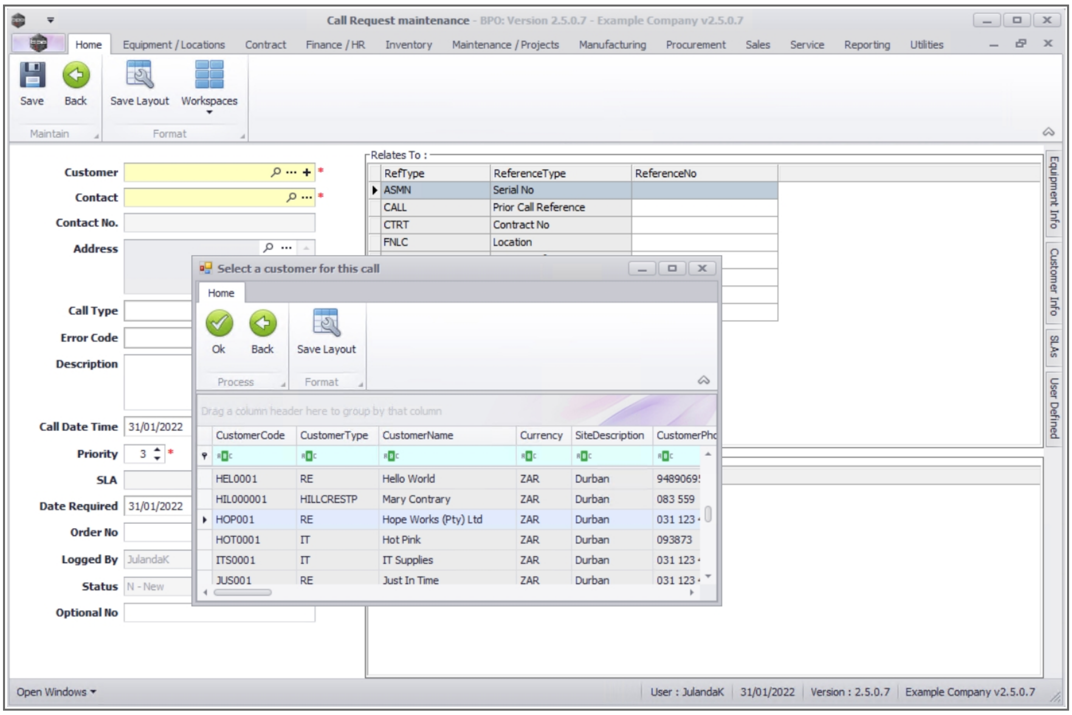
OPEN CALL

1. If a call is open against the selected serial no, then you will receive an *Input Validation* message to confirm;
   - ***An open call with the following info exists against this machine: Reference no: CN[*ref. number*], Description: [*call description*], Call Type: [*call type*]. Are you sure a new call must be added?***
2. Click on ***Yes*** to create a new call, or,
   - Click on **No** to ignore the request and to return to the Call Request screen.
3. If you have selected to create a new call, continue logging the "Call Request Details" on page 7.



CALL REQUEST BY CUSTOMER

1. From the ***Call Request maintenance*** screen, click on the ***Search*** button in the ***Customer*** field to display the ***Select a customer for this call*** screen.
2. Click on the ***row*** of the customer you wish to log a call request for.
3. Click on ***OK***.



CALL REQUEST DETAILS

- **Customer:** The customer field will auto populate with the customer name selected.
- **Contact:** Click on the **search** button to select the contact you wish to add to the call request.
- **Contact No:** This field will auto populate with the contact number for the contact selected.
- **Call Type:** Click on the down **arrow** to select the required call type from the drop-down list.
- **Error Code:** Click on the down **arrow** to select the error code, quoted by the customer.
- **Description:** Click in the text box to type in a description of the work that is required.
- **Call Date Time:** This field will display the current date and time.
    - **Date:** Type in or click on the down **arrow** to select an alternative date using the calendar function, if

applicable.

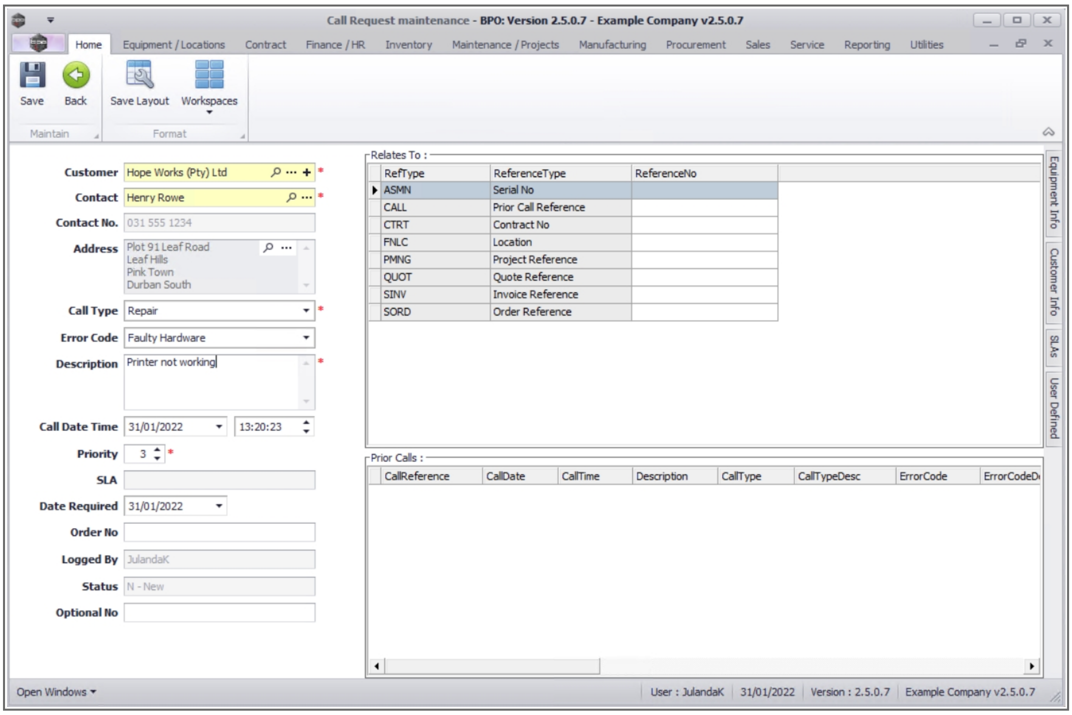
- **Time:** Type in, or use the **arrow** indicators to select an alternative time, if applicable.

- **Priority**[1]: Type in or use the **arrow** indicators to select the call request priority.
- **Date required:** This field will default to the current date and time the call request is logged.
    - **Date:** Type in or click on the down **arrow** to select an alternative date, using the calendar function, if applicable.
    - **Time:** Type in, or use the **arrow** indicators to select an alternative time, if applicable.
- **Order No:** Type in the Purchase Order number raised by the customer, if applicable.

> ***Note*** that the order number can be mandatory based on the customer contract configuration, i.e. if it is specified in the contract to include an Order Number, then this field will be mandatory for the particular customer.

- **Logged By:** This field will auto populate with the name of the person logging the call request. This field cannot be modified.
- **Status:** The status will be set to ***N*** - New, by default and cannot be modified.
- **Optional No:** This field can be used for an optional reference number that the customer may wish to keep on record.

[1] 1 = Most Important and 5 = Least Important



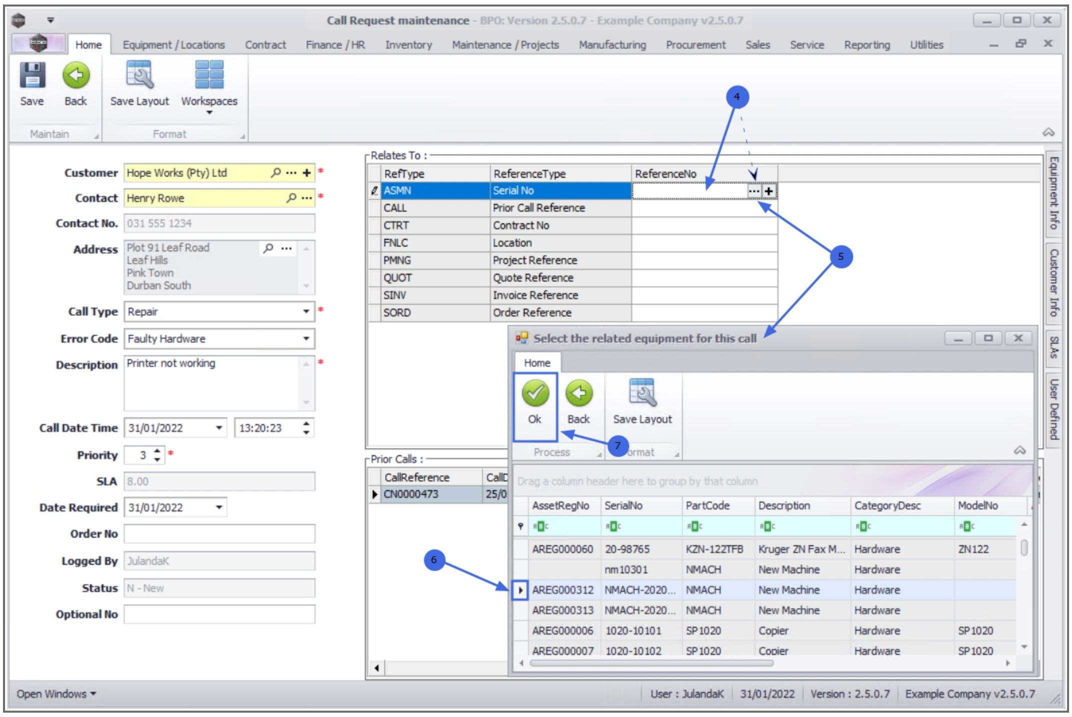
RELATES TO FRAME

If you did not select the serial no first, then the relates to frame needs to be updated.

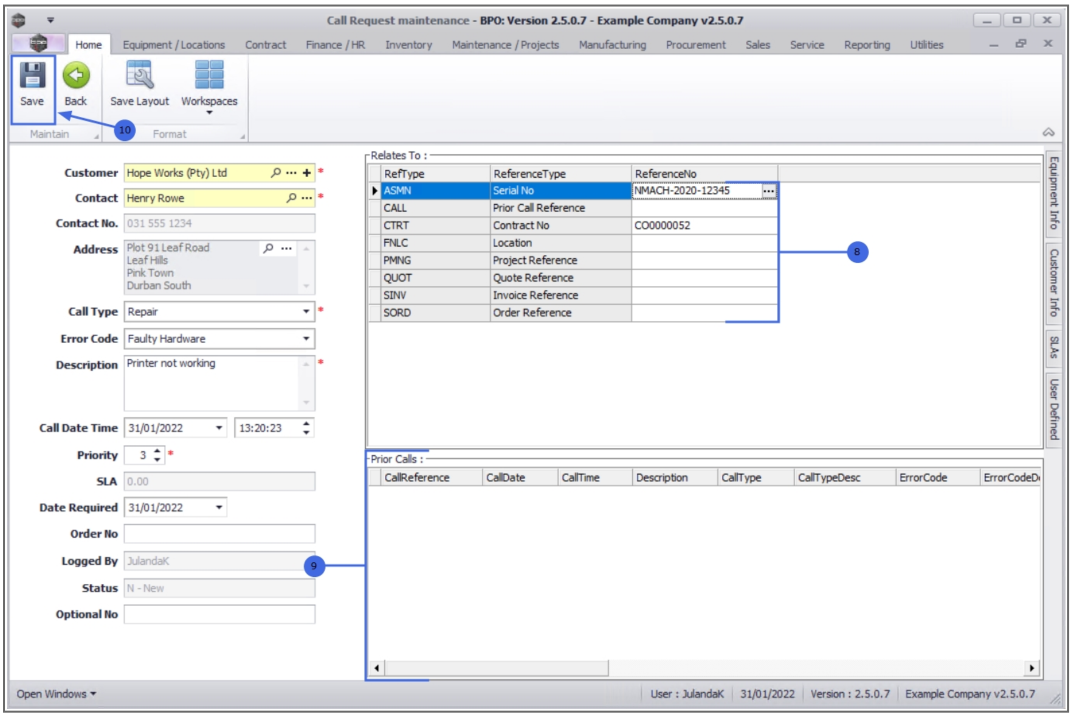
4. **Serial No:** Click in the ***Reference No.*** text box to display the ellipsis button.
5. Click on the ellipses button to display the ***Select the related equipment for this call*** screen.

> *Note* that the list will be limited to those machines linked to the customer, if the customer was selected first.

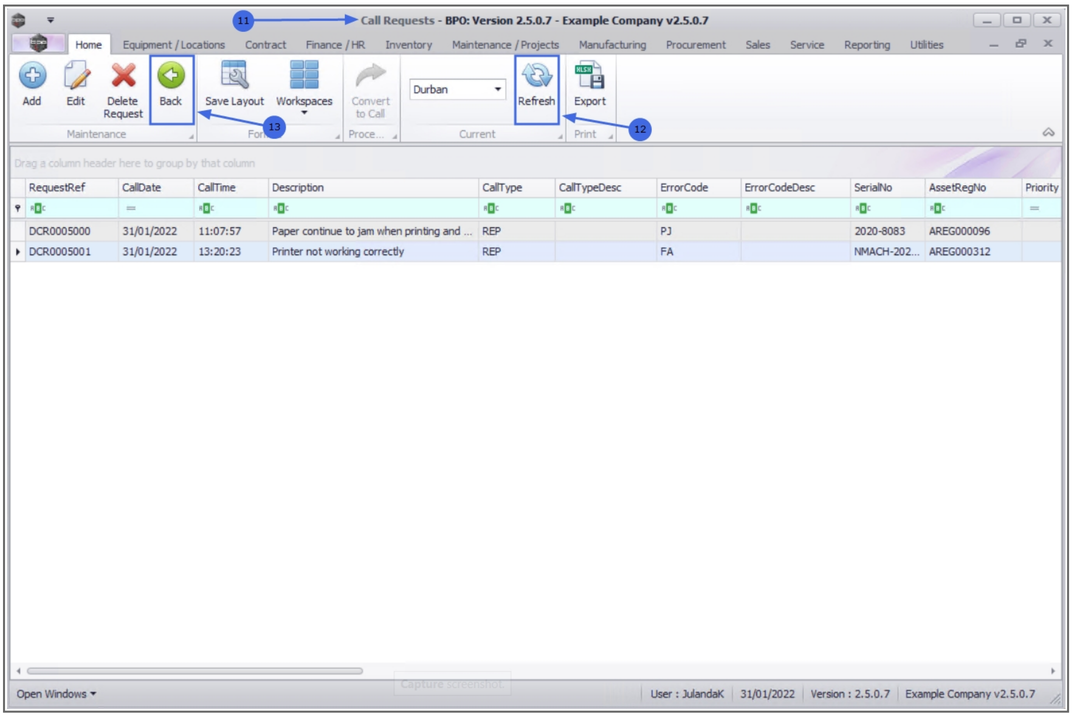
6. Click on the ***row*** of the equipment serial no. that you wish to add to this call request.
7. Click on ***OK***.



8. As the ***serial number*** is selected, any other details related to the selected equipment will auto populate,if available.
9. Any ***prior calls*** linked to the selected ***serial no*** will display in the ***Prior Calls*** frame.
10. Click on ***Save***.



11. You will return to the ***Call Requests Listing*** screen where you can view the call request.
12. Click on **Refresh** to update the screen, if required.
13. Click on **Back** to exit the call request listing screen


11
Call Requests - 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
Delete Request
Back
Save Layout
Workspaces
Convert to Call
Durban
Refresh
Export
Maintenance
Current
Print
13
12
Drag a column header here to group by that column
RequestRef
CallDate
CallTime
Description
CallType
CallTypeDesc
ErrorCode
ErrorCodeDesc
SerialNo
AssetRegNo
Priority
DCR0005000
31/01/2022
11:07:57
Paper continue to jam when printing and ...
REP
PJ
2020-8083
AREG000096
DCR0005001
31/01/2022
13:20:23
Printer not working correctly
REP
FA
NMACH-202...
AREG000312
Open Windows
User : JulandaK
31/01/2022
Version : 2.5.0.7
Example Company v2.5.0.7

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