

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 <u>Call</u>, 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

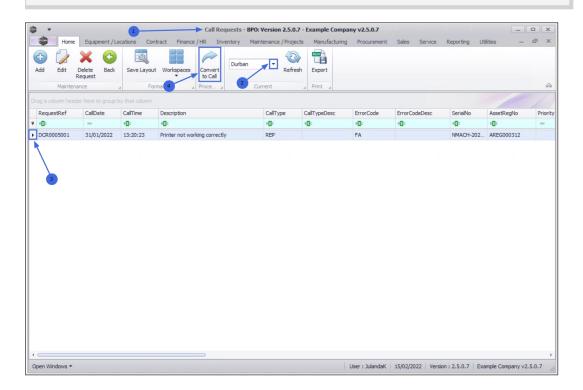




- 1. The *Call Requests* listing screen will be displayed.
- 2. Select the *Site* where the call request was logged.
 - The example has *Durban* selected.
- 3. Click on the *row* of the call request you wish to convert to a Call.
- 4. Click on *Convert to Call*.

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

Note that if the customer has <u>not</u> been released from hold, the Convert to Call button will be <u>inactive</u> (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.

\$ =				Call Requ	ests - BPO: Version 2.5.0.	7 - Example Cor	npany v2.5.0.7			-	
Ec	uipment / Location	Contract	Finance / Hi	R Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Ser	vice Reporting	Utilities	
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Call Requests										_	
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DCR0005001	31/01/2022	13:20:23	Printer	Call Type: S Are you sur	ervice e a new call must be addeo	1?			NMACH-202	AREG000312	
				6		Yes	No				

- 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.

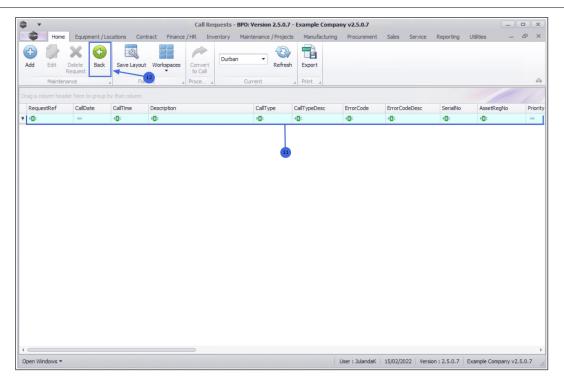
10. Click on **Save** when done.

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Home Equipment	/Locations Contra	ct Finance / HR	Inventory	Maintenance /	Projects Mar	ufacturing	Procureme	ent Sale	s Service	Reporting	Utilities	_ 8	х
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Open Windows -							User : Juland	aK 15/02	2/2022 Vers	on : 2.5.0.7	Example Com	pany v2.5.0	.7

- 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.



Call Requests - Convert to Call



VIEW CALL

Ribbon Access: Service > Call

4) -					BPO	Version 2.5.0	.4 - Example	Company	2.5.0.0					- D X
		Equipment /	Locations	Contract	Finance / HR	Invento	ry Mainten	ance / Projects	Manufa	cturing	Procurement	Sales	Service	Reporting	Utilities
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			Technical		4			Proces	SS		A	Ticke	ting 🖌	Open W "	\sim

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



Call Requests - Convert to Call

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t) [/	19/08	/2021 🔻	2	Default	Worksp		🕴 🚱 📲	4			
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Information	n	No Of Calls		E CN0005303	31/01/2022	UnAssigned		13:20:23	Drum replacement required	SERV	Service
👻 💽 Du		28	1	CN0005301	18/01/2022	Awaiting Acceptance	Julanda Kessler	12:59:13	Replace part - current faulty	PR	Parts Re
-	New	21		CN0005300	18/01/2022	Awaiting Acceptance	Julanda Kessler	12:51:45	Printer displaying error code	REP	Repair
-	In Progress				18/01/2022	Awaiting Acceptance	Julanda Kessler	12:44:53	Paper keeps on jamming in machine	ITS	IT-Suppo
-	Hold Pending	3			26/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	2MS - 2 month service	SM	Schedule
-	Complete	1			22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Schedule
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-	Complete	0	۰ŀ-		15/09/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Schedule
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	pe Town	0			03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Schedule
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()	Hold	0			20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Schedule
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0	All	0	-	4							

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