

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.

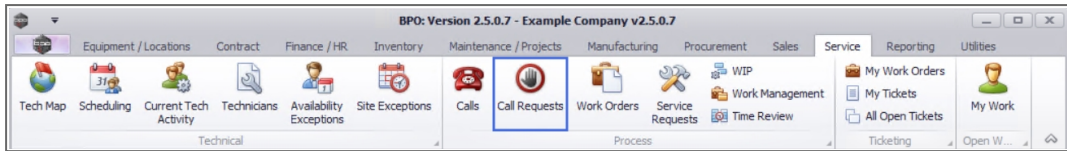
The difference between a **Call** and a *Call Request* is that with a **Call**, the corresponding action is performed by the servicing business in response to the **Call**, within the stipulated **SLA period**.



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



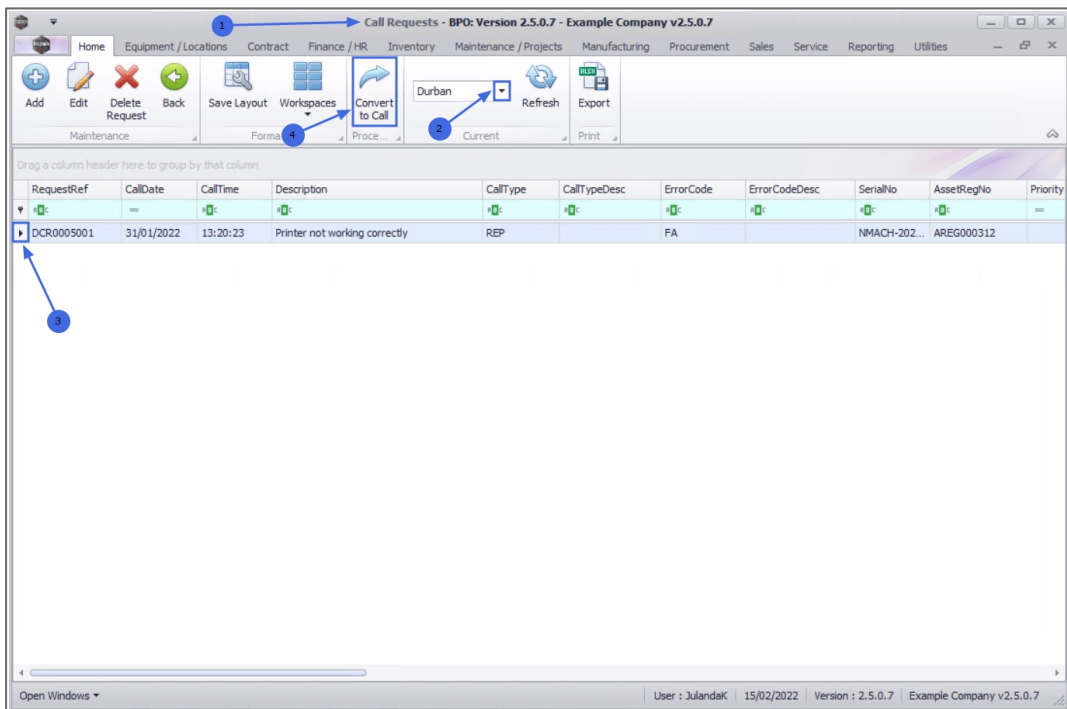
1. The **Call Requests** listing screen will be displayed.
2. Select the **Site** where the call request was logged.
 - The example has **Durban** selected.
3. Click on the **row** of the call request you wish to convert to a Call.
4. Click on **Convert to Call**.



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).

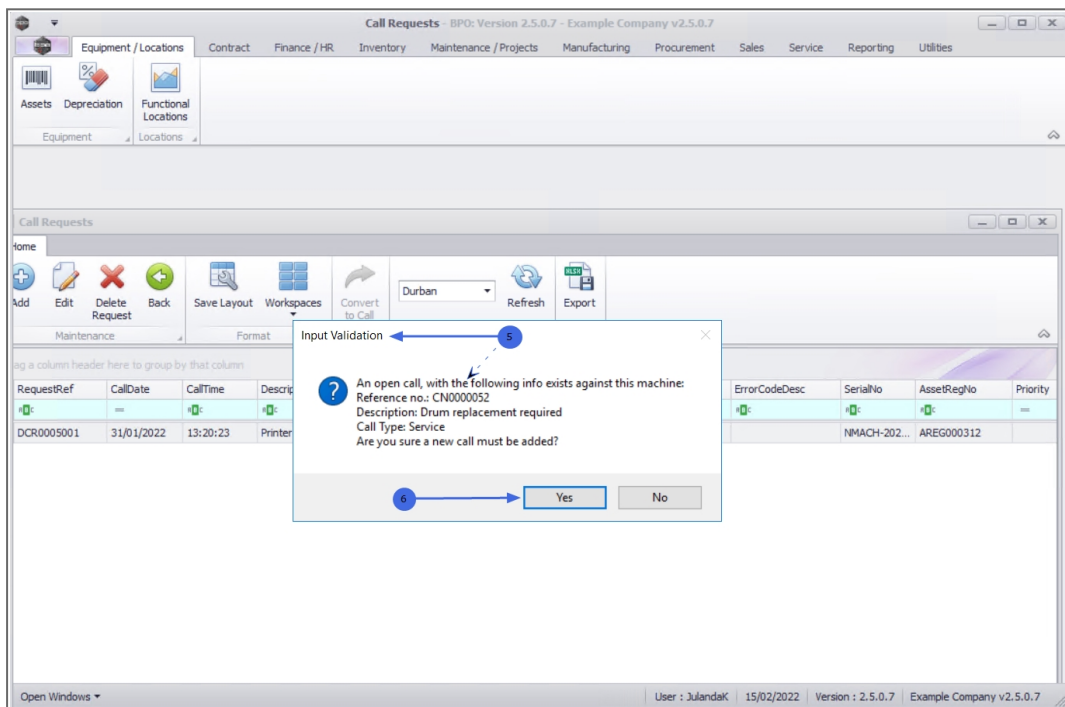


OPEN CALL

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.

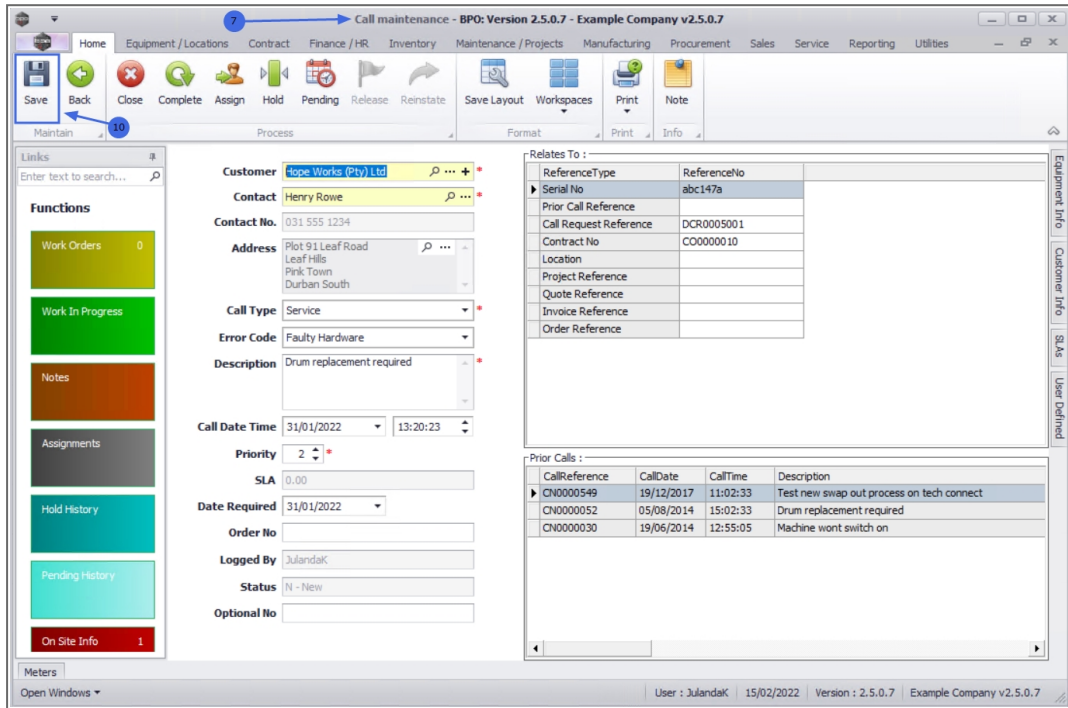


7. The **Call maintenance** screen will be displayed.
8. The Call fields will auto-populate with the information previously captured when the Call Request was logged.

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

 Refer to the [Call Requests - Add Call Request](#) to update the call information.

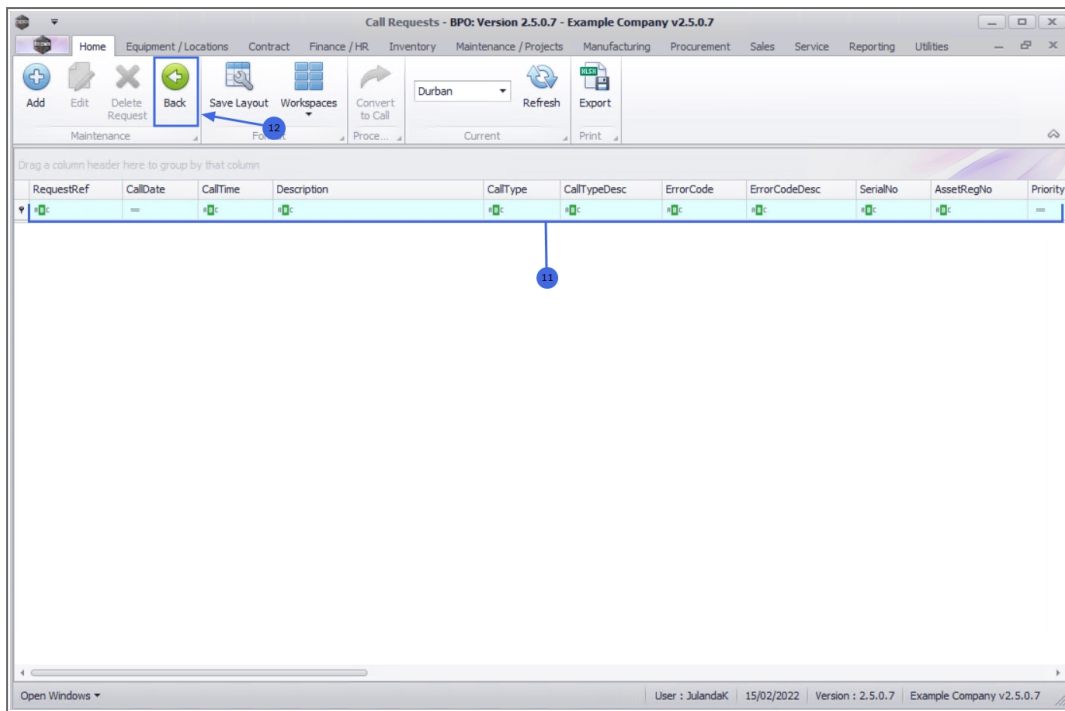
10. Click on **Save** when done.



11. The Call Request will be **removed** from the Call Requests listing screen.

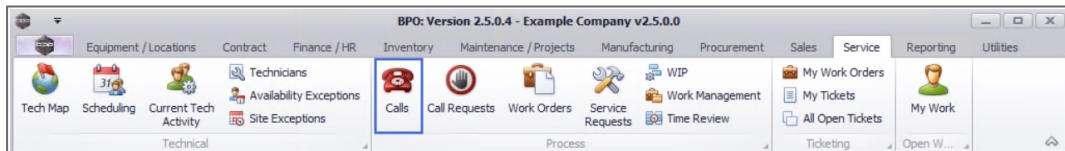
- Click on **Refresh** to update the screen, if required.

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

19/08/2021 | 15/02/2022 | Refresh | My Calls | Save Layout | Workspaces | Save Filter | My Call | Assign | Start | Close | Complete | Hold | Pending | Release | Print | Reports

Find | Filter

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	ZMS - 2 month service	SM	Schedulec
CN0005293	22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005292	16/10/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Schedulec
CN0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005287	24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installatio
CN0005284	15/09/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Schedulec
CN0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005282	03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005281	27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005280	26/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Schedulec
CN0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Schedulec
CN0005273	30/09/2021	UnAssigned		15:27:59	PRJ408/1	NDS	New Deal

Count: 21

User : JulandaK | 15/02/2022 | Version : 2.5.0.7 | Example Company v2.5.0.7

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