

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.

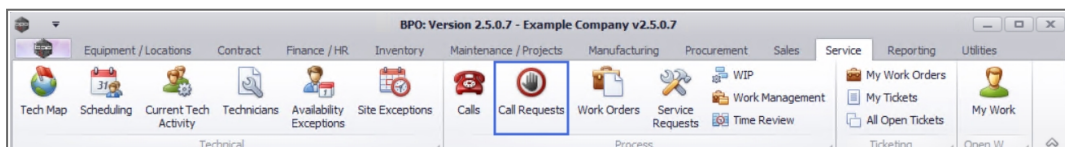
The difference between a **Call** and a **Call Request** is that with a **Call**, the corresponding action is performed by the servicing business in response to the **Call**, within the stipulated **SLA period**.



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*



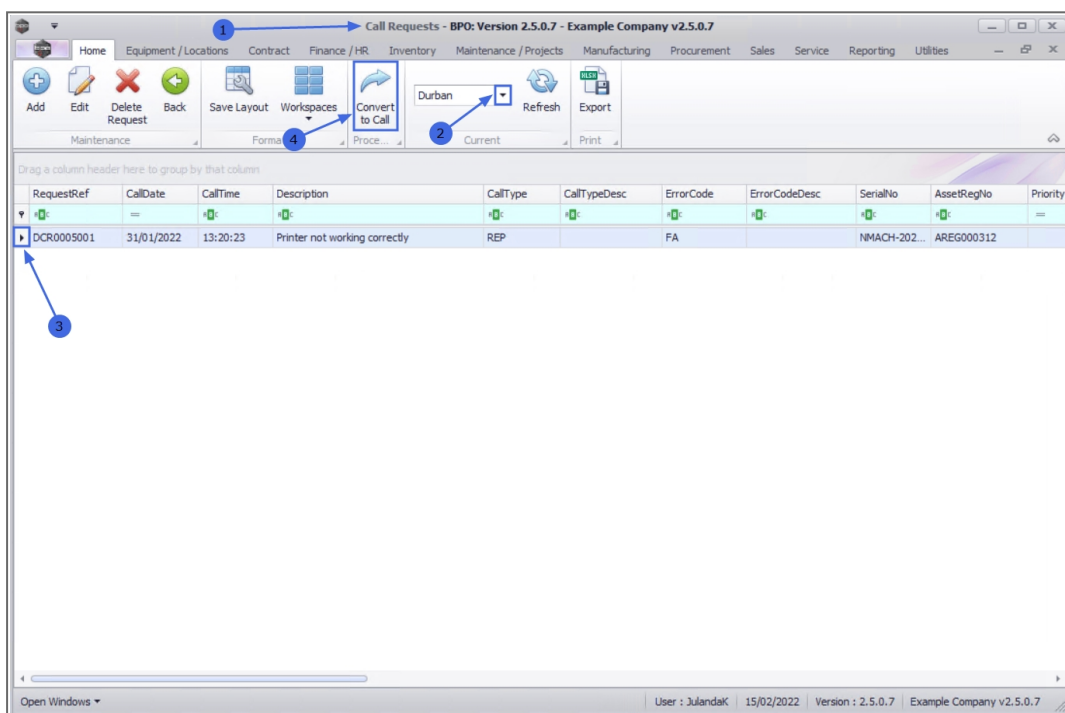
1. The **Call Requests** listing screen will be displayed.
2. Select the **Site** where the call request was logged.
 - The example has **Durban** selected.
3. Click on the **row** of the call request you wish to convert to a Call.
4. Click on **Convert to Call**.



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

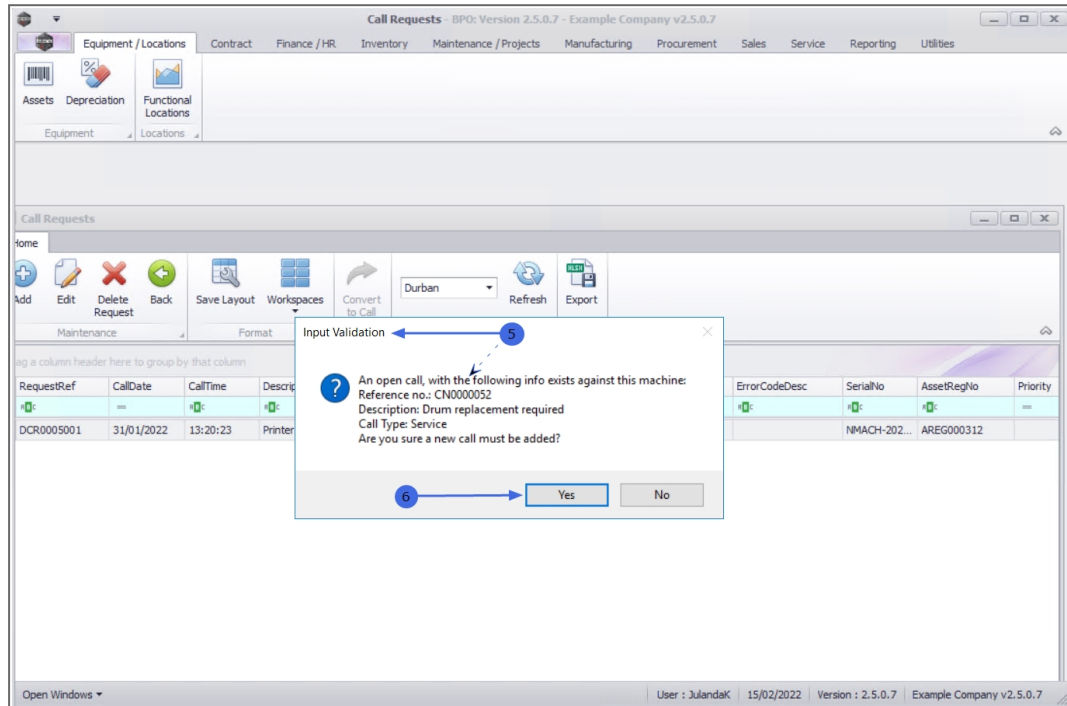
5. If an open call exist for the machine, you will receive an **Input Validation** message to confirm;
 - **An open call with the following info against this machine**

[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.

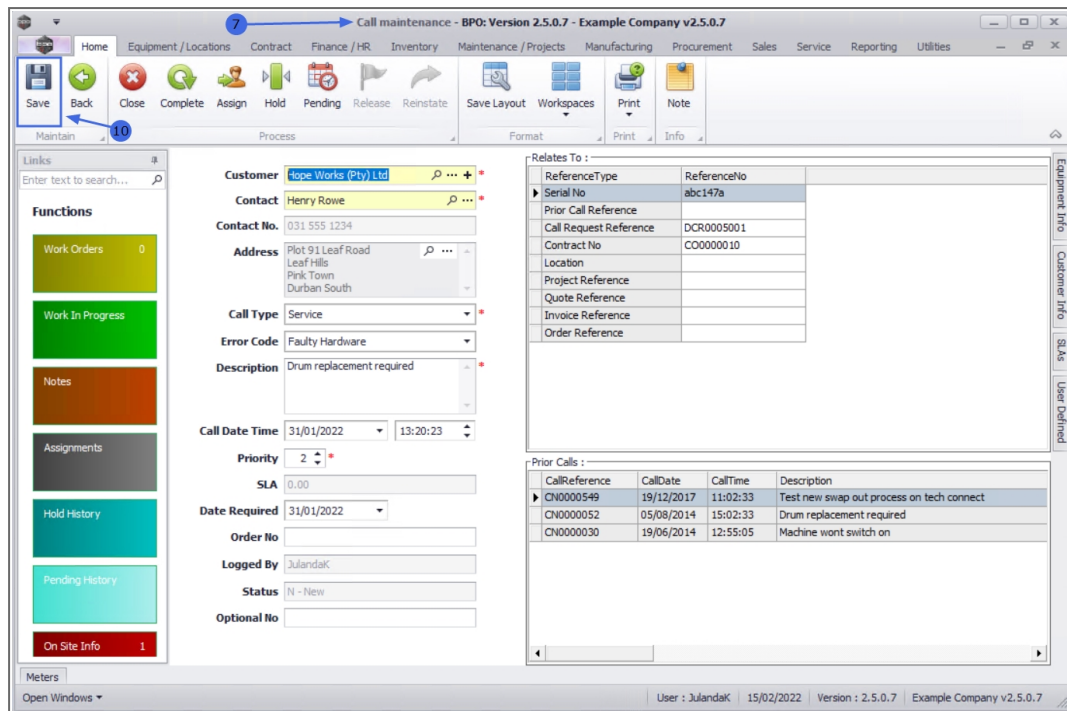


7. The **Call maintenance** screen will be displayed.
8. The Call fields will auto-populate with the information previously captured when the Call Request was logged.
9. Make changes to the information on the screen, if required.



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

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



Call maintenance - 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

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Links Enter text to search...

Functions

- Work Orders 0
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info 1

Customer: Hape Works (Pty) Ltd

Contact: Henry Rowe

Contact No: 031 555 1234

Address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

Call Type: Service

Error Code: Faulty Hardware

Description: Drum replacement required

Call Date Time: 31/01/2022 13:20:23

Priority: 2

SLA: 0.00

Date Required: 31/01/2022

Order No:

Logged By: JulandaK

Status: N - New

Optional No:

Relates To:

ReferenceType	ReferenceNo
Serial No	abc147a
Prior Call Reference	
Call Request Reference	DCR0005001
Contract No	CO0000010
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls:

CallReference	CallDate	CallTime	Description
CN0000549	19/12/2017	11:02:33	Test new swap out process on tech connect
CN0000052	05/08/2014	15:02:33	Drum replacement required
CN0000030	19/06/2014	12:55:05	Machine wont switch on

Meters

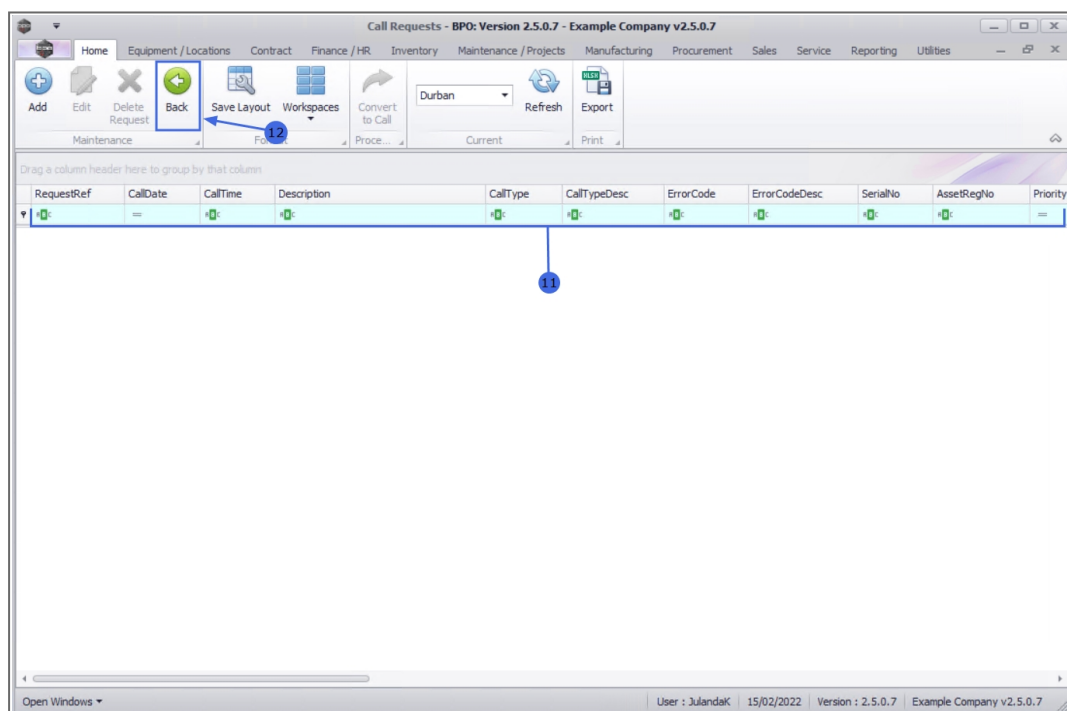
Open Windows

User: JulandaK 15/02/2022 Version: 2.5.0.7 Example Company 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 - 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 Refresh Export

Drag a column header here to group by that column

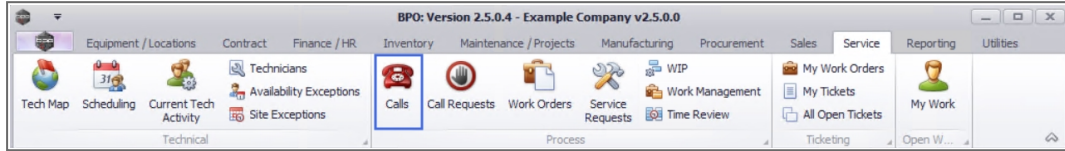
RequestRef	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	AssetRegNo	Priority

Open Windows

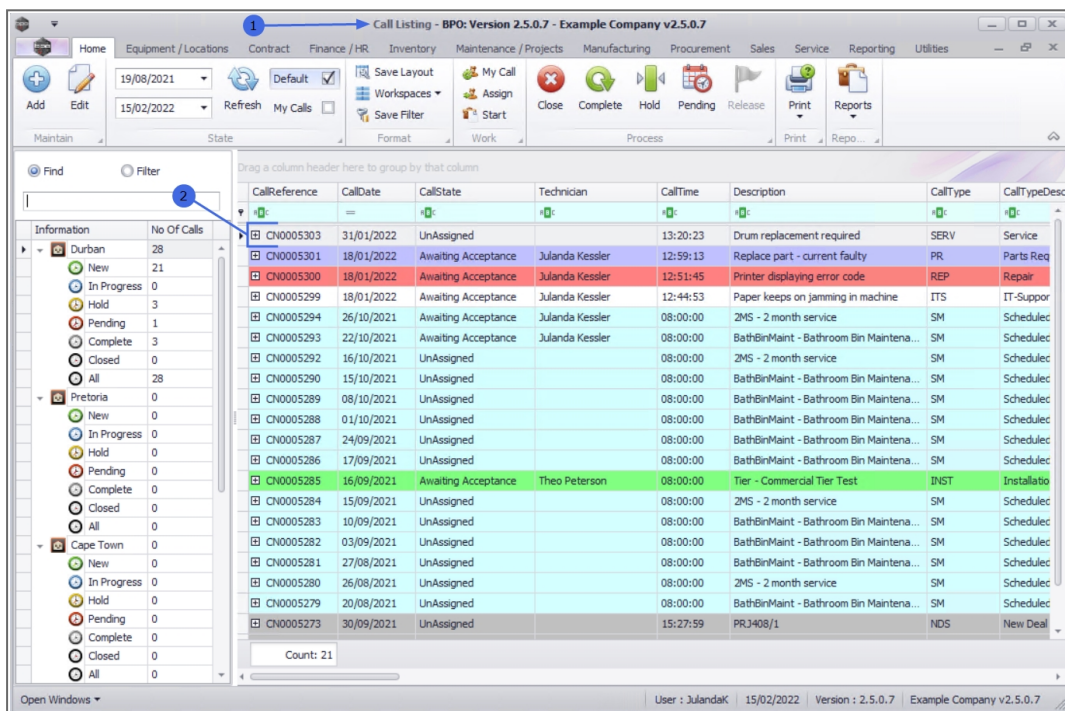
User: JulandaK 15/02/2022 Version: 2.5.0.7 Example Company v2.5.0.7

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.



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