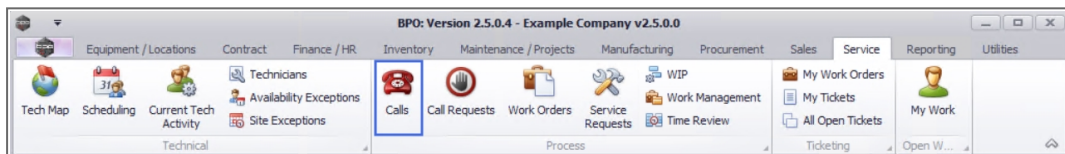


SERVICE

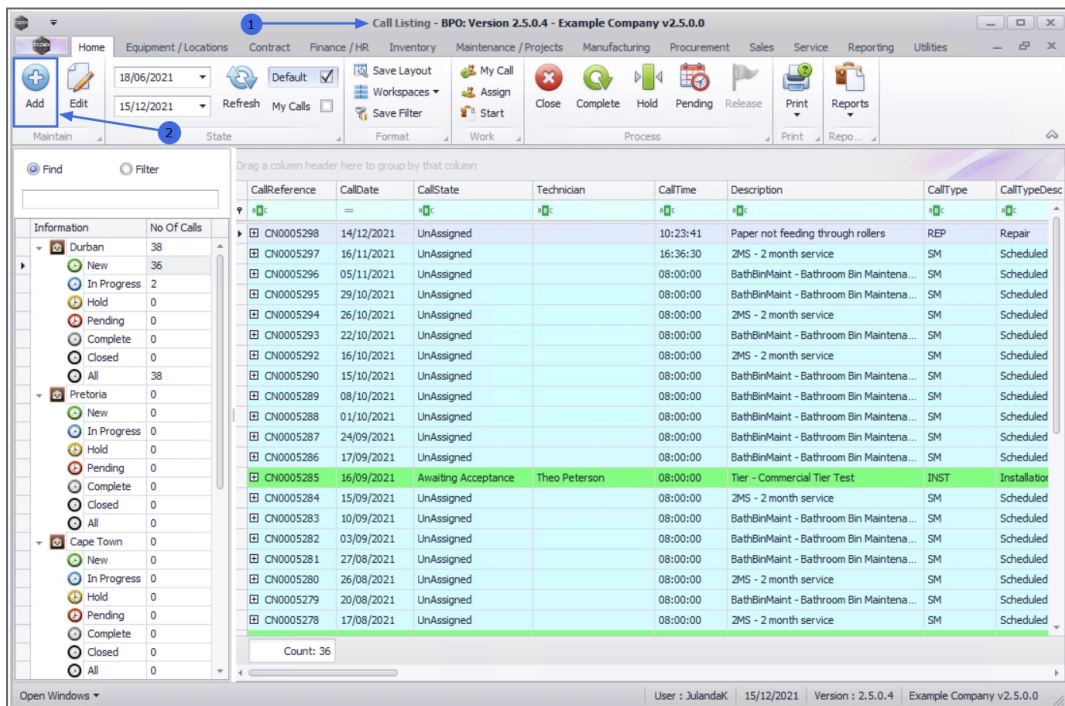
CALLS - CUSTOMERS ON HOLD

You cannot log a call for a customer that is on Hold. There are a few places that will indicate whether the customer is on hold or not, when logging a call by selecting the Customer first.

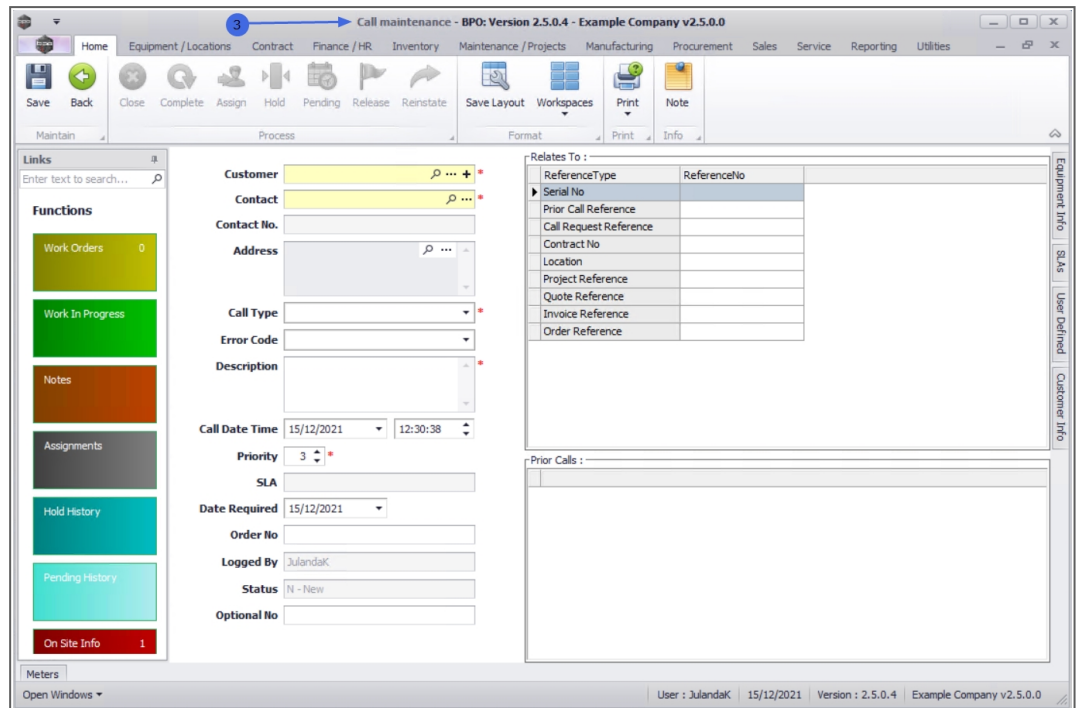
Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.
2. Click on **Add**.



- The **Call maintenance** screen will be displayed.



Call maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Meters

Open Windows

Customer

Contact

Contact No.

Address

Call Type

Error Code

Description

Call Date Time 15/12/2021 12:30:38

Priority 3

SLA

Date Required 15/12/2021

Order No

Logged By JulandaK

Status N - New

Optional No

Relates To :

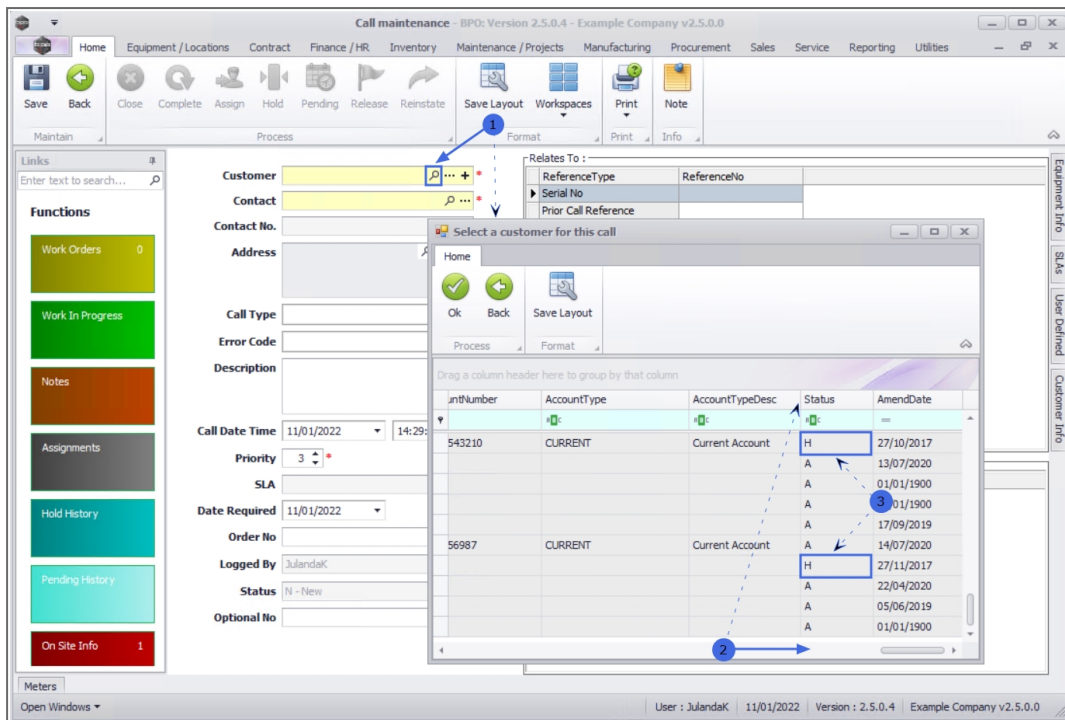
ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls :

User : JulandaK 15/12/2021 Version : 2.5.0.4 Example Company v2.5.0.0

SELECTING THE CUSTOMER FIRST

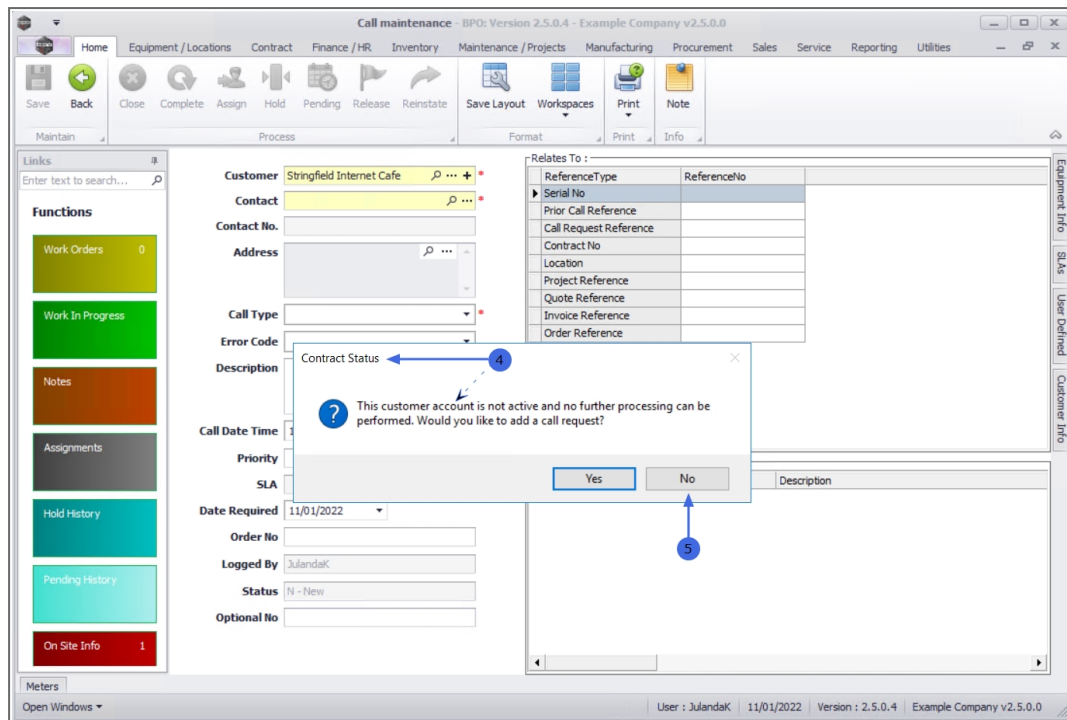
- Click on the **search** button in the Customer field to display the **Select a customer for this call** screen.
- Use the scroll bar to **scroll** until you can view the **Status** column.
- The status column will display the status of **H** for customers on **Hold**.



NO CALL REQUEST REQUIRED

4. If you select a customer that is on hold, the **Customer Status** message will display informing you that;
 - ***This customer is currently on hold and no further processing can be performed. Would you like to add a call request?***
5. Click on **No** if you do not wish to add a **call request**¹.

¹Additional user defined fields to classify the contract, which is viewable in the Period and Ad-hoc Escalation screens.

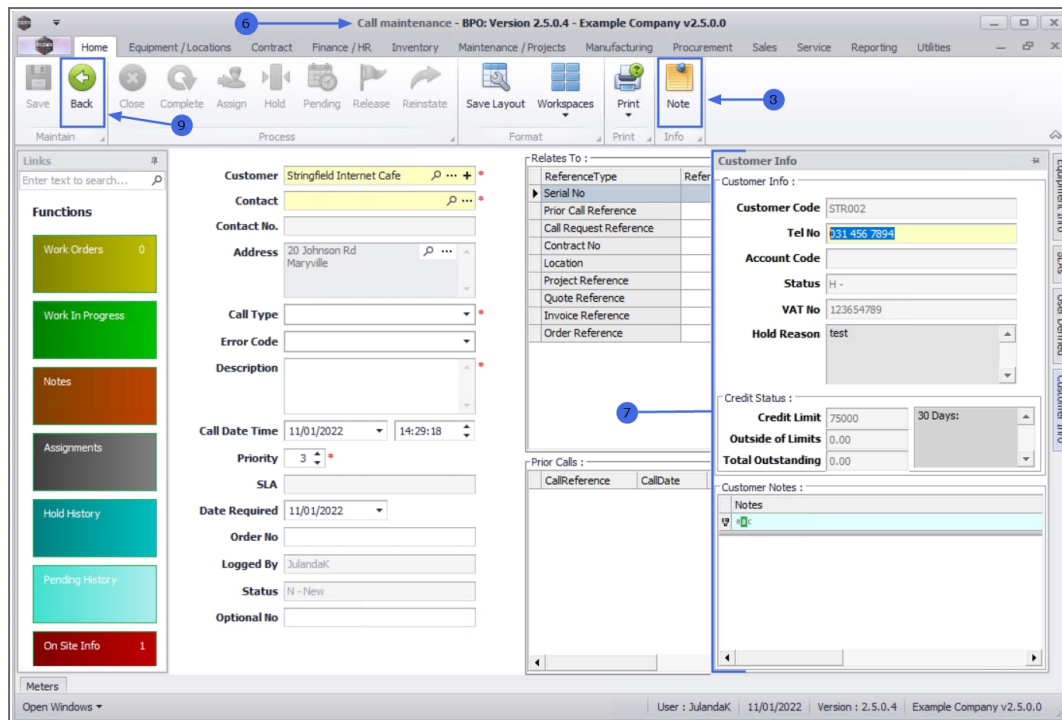


6. You will return to the **Call maintenance** screen.
7. The **Customer Info** panel will expand to display the **Telephone Number**, **Credit Status** and the **Customer Notes** for the Customer.
8. Click on **Notes** to add a Customer note for the Call.



Refer to "**Call Details**" on page 4 to add a note related to the Customer.

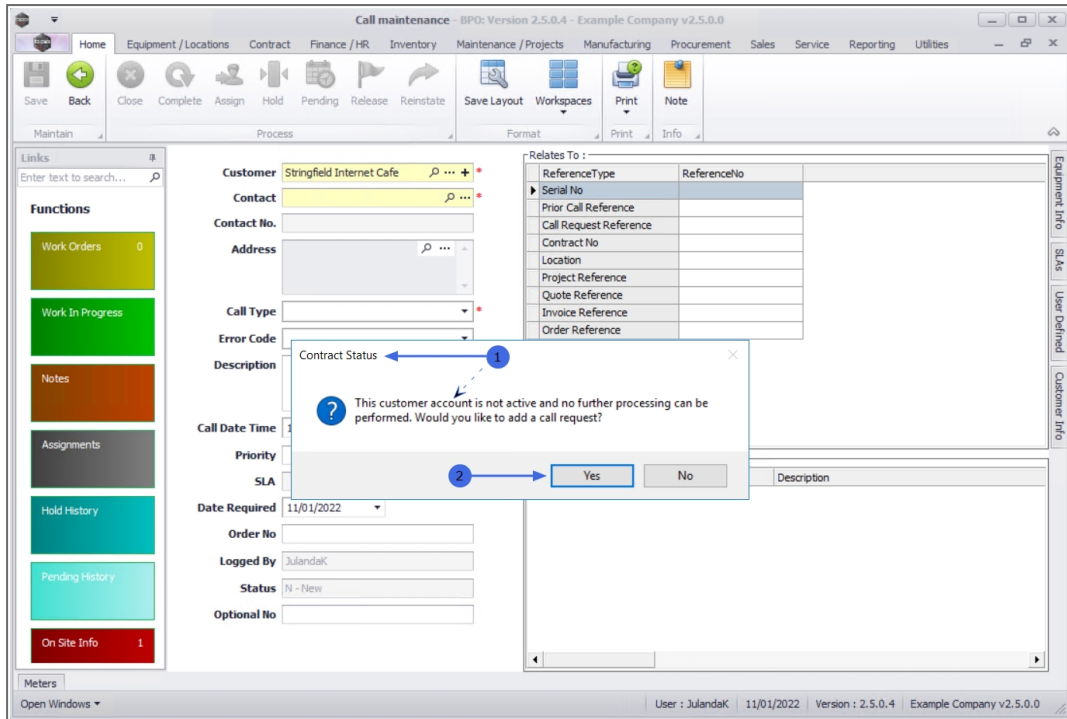
9. Click on **Back** to return to the **Call Listing** screen.



ADD A CALL REQUEST

A Call Request is logged to form a record of a request from a customer, whose account is in arrears, on hold or whose contract is on hold. No corresponding action will be performed to address the request until the customer or contract is no longer on hold, or the account is settled. The call request will then be converted to a Call. Refer to [Call Requests - Convert to Call](#)

1. If you have selected a customer that is on hold, then a **Customer Status** message will display, informing you that;
 - ***This customer is currently on hold and no further processing can be performed. Would you like to add a call request?***
2. Click on **Yes** to add a call request.



The screenshot shows the 'Call maintenance' screen in the CO3 system. The main window displays a customer record for 'Stringfield Internet Cafe'. A modal dialog box is open, displaying a warning message: 'This customer account is not active and no further processing can be performed. Would you like to add a call request?'. The dialog has 'Yes' and 'No' buttons. The background form includes fields for Customer, Contact, Address, Call Type, Error Code, Description, Call Date Time, Priority, SLA, Date Required, Order No, Logged By, Status, and Optional No. A 'Relates To' table is also visible on the right side of the form.

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

3. "The Call Requests Maintenance screen will be displayed." on page 2



Refer to "Call Request By Customer" on page 6 to add a Call Request for the Customer.

4. Click on **Save** to save the Call Request and to return to the **Call Listing** screen.

Call Request maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Maintain Format

Customer: **Stringfield Internet Cafe** ... +

Contact: ... +

Contact No.:

Address: ... +

Call Type:

Error Code:

Description:

Call Date Time: 11/01/2022 15:51:17

Priority: 0

SLA:

Date Required: 11/01/2022

Order No.:

Logged By: JulandaK

Status: N - New

Optional No.:

Relates To:

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	
CALL	Prior Call Reference	
CTRT	Contract No	
FNLC	Location	
PMNG	Project Reference	
QUOT	Quote Reference	
SDNV	Invoice Reference	
SORD	Order Reference	

Prior Calls:

CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeD
---------------	----------	----------	-------------	----------	--------------	-----------	------------

Open Windows

User: JulandaK 11/01/2022 Version: 2.5.0.4 Example Company v2.5.0.0

ST.122.001b

