TEAM *Software*
by **WORKWAVE**

Customer Service Requests Training Manual

TEMPLACMS

Version: v.6.1.0 (July 2019)

COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

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OVERVIEW

The purpose of this module is to offer a central user interface for access to the company's trading partners, namely clients, suppliers and employees, along with prospects for all three. Common information that relates to live or prospect records will be shown within the same display, enabling users to quickly navigate and locate information. Drilldown to other related records or transactions will be provided. For example, a Help Desk call relating to a complaint will enable the user to locate the site/contract, add a service request, initiate the business process through action requests, and then subsequently track it through to completion.

Key to this initial process is the user interface, known as the Address Book. Existing features within TemplaCMS will now be available through an address-driven user interface, designed for those users who are authorised and wish to interact with the system in this way. Related contacts, notes, forms and attachments will be accessible, along with a new facility for service requests.

INTRODUCTION

These training session notes are designed to provide background information and useful hands-on experience of using general CMS functions and the CMS customer service module. These notes are designed to complement the training and assist you at a later stage when away from the training environment.
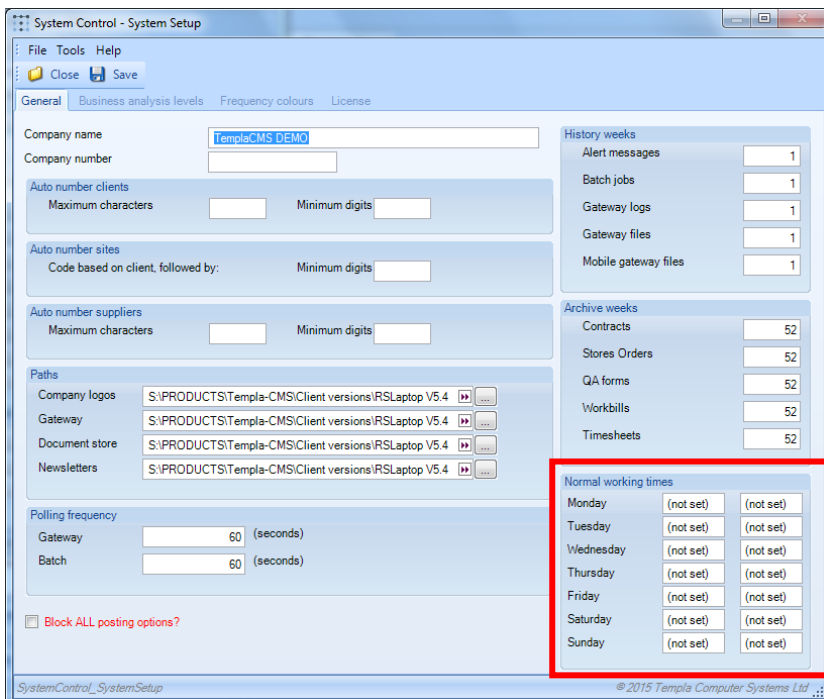
SYSTEM

License

The Customer Service (CS) module is separately licensed so a relevant license key must be obtained from TEAM Software and applied to TemplaCMS.
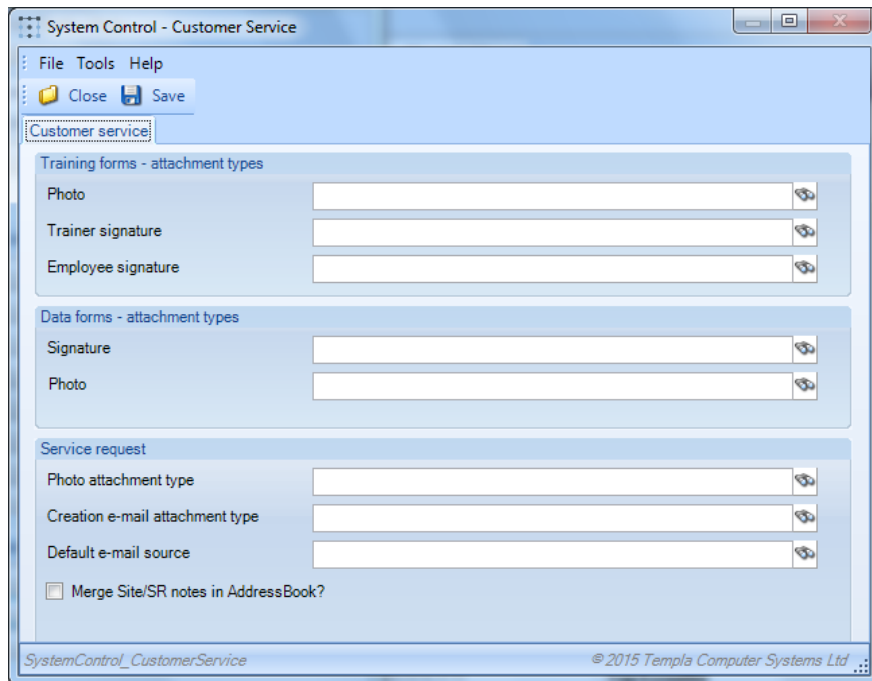
System Control

SYSTEM SETUP > GENERAL TAB

Normal working times (i.e. office hours) can be defined. If defined, this will be used to affect the lapsed time and (shortly) the activity ageing calculation.

CUSTOMER SERVICE TAB

The **Customer Service** tab on the System Control maintenance option should be reviewed and completed, as necessary. All these fields are used in conjunction with mobile integration.

The relevant attachment types should be associated with the relevant areas of Customer Service. Indeed, where mobile is in operation, it is imperative that default attachment types are defined here for all areas actioned on the mobile and that these attachment types must have the relevant level of permissions (i.e. Add) for the user role controlling the inward synchronisation of items back from the mobile into Templa-CMS, as it is at this point that these defaults are utilized. In addition, this same user role must be assigned to the necessary 'Document Management' function groups.

Functions & Function Groups

There is a vast range of new **functions** to cover all the new CS options. These have been grouped into the following **function groups**:

- *CS – Customer Service Functions
- *CSV - Customer Service Functions – View

It is up to the Templa-CMS system administrator to add these (or other bespoke) **function groups** into their existing **function group structure** so that only the relevant users see the relevant QA options.

MAINTENANCE

Service Requests

Service requests are a container comprising one or more **action requests**, with each **service request** belonging to a **SR Type** (and thus **SR Group**) and being assigned a **SR Source** and **SR priority** (if not defaulted from the **SR Type**), plus given a **SR reason** upon completion.

SR GROUPS

SR Groups are defined to enable grouping of **service requests** by concept, department or area, as a **service request** could be anything from a complaint to a sales lead:

Only a *code* and *description* needs to be defined, although the *code* is prefixed to the **service request** number to enable easy identification of the various **service requests** for different concepts, departments or areas within a company:
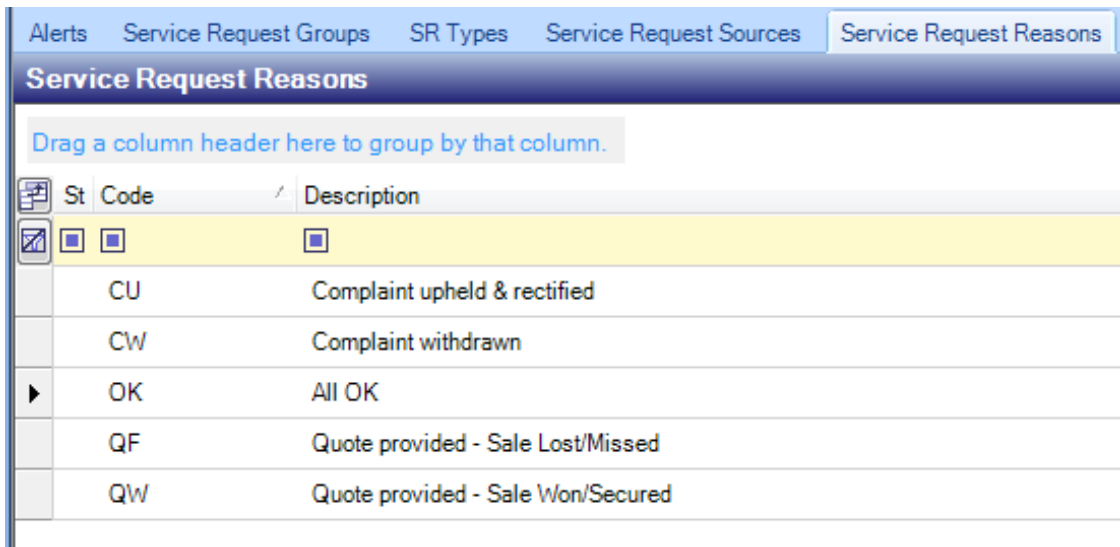

SR SOURCES

A **SR source** is required when entering a new **service request** to indicate where the **service request** came from, for example:

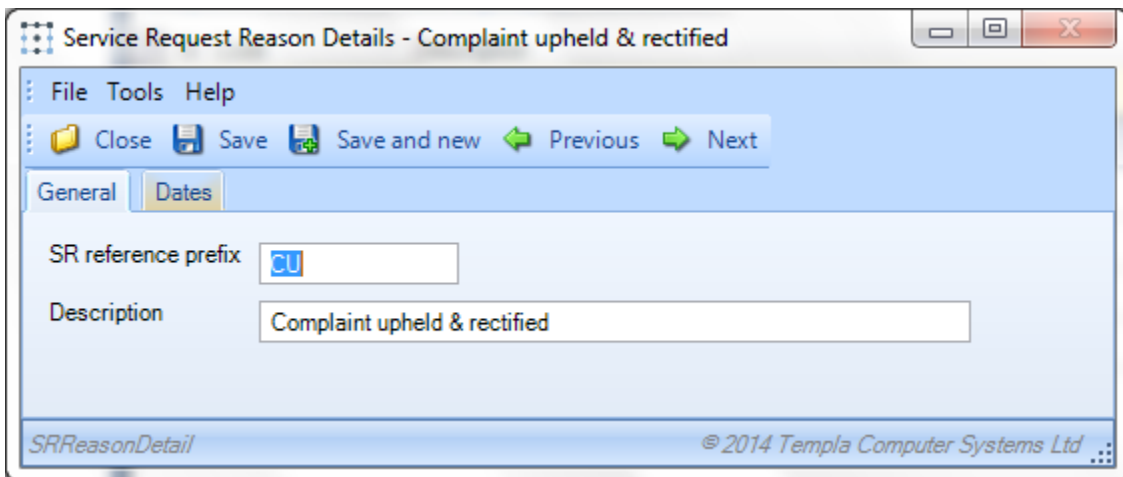Again only a *code* and *description* needs to be defined:

SR REASONS

A **SR reason** is required when completing a **service request**. These can be quite generic (e.g. 'Internal' or 'External') or more specific, such as those defined below:
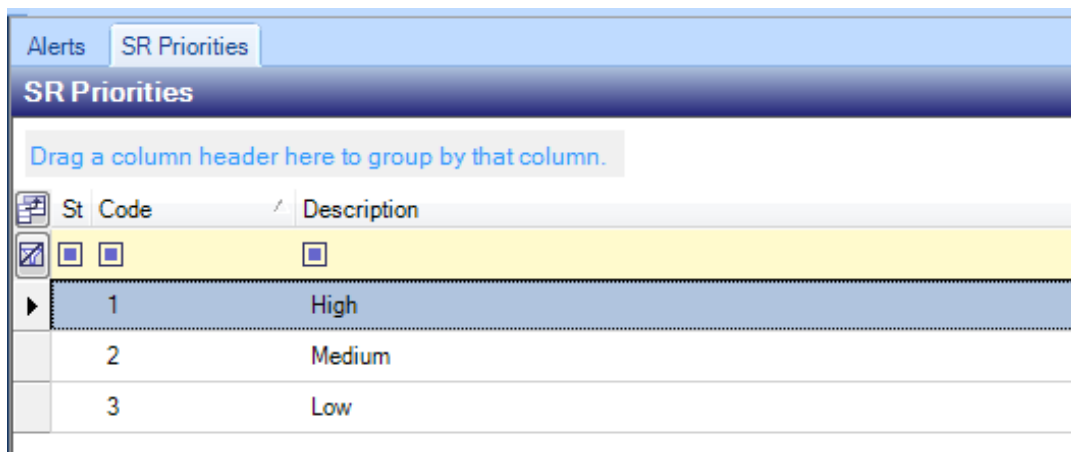
Again only a *code* and *description* needs to be defined:

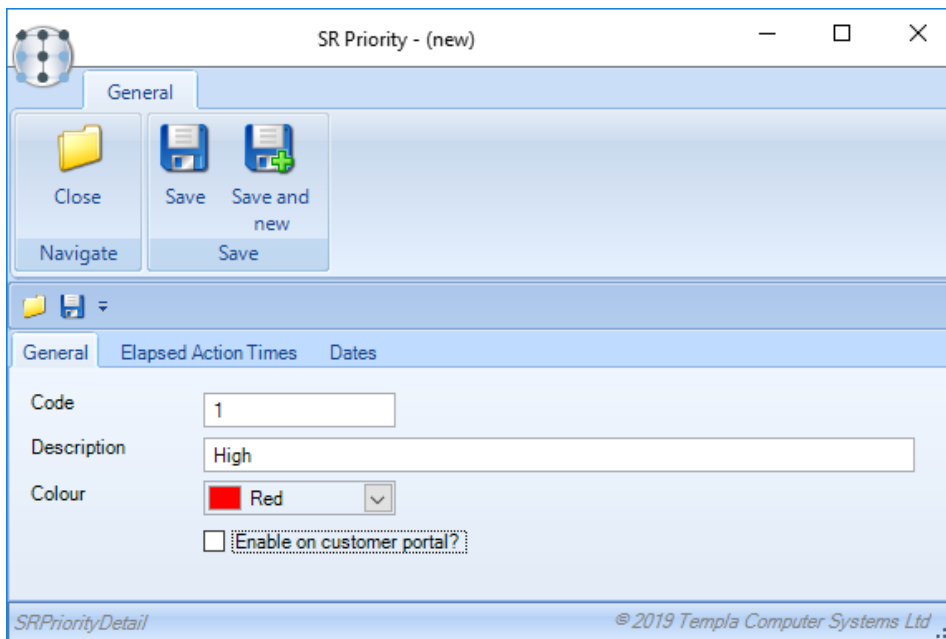## SR PRIORITIES

A **SR priority** is required when entering a new **service request** to indicate its **priority**, for example:

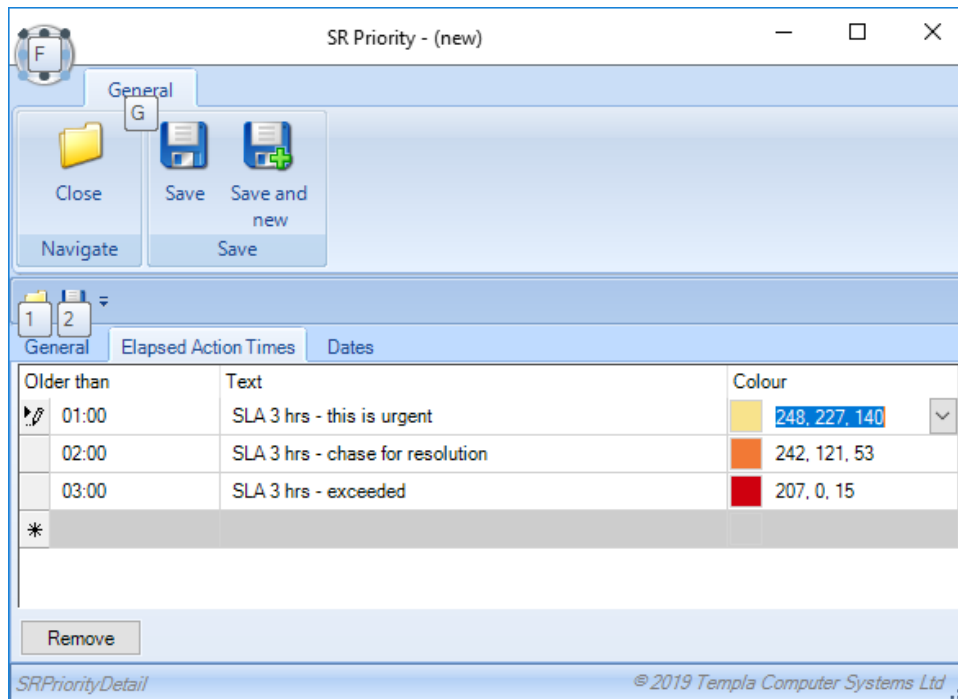In addition to a *code* and *description*, *colour* and '*Enable on Customer Portal*' can be defined:

In addition, elapsed action times can be optionally defined:

When defined, the existing 'Elapsed time' field on the Service Request header and on the Service Request List will be colour-coded based on the priority's elapsed time rules.

NB: this colour coding is based on elapsed time in contrast to the activity ageing.

SR TYPES

A **SR type** is required when entering a new **service request** as this determines the **SR group** and any default **action requests** – thus, **SR types** reflect the type of **service request**, be this for a customer complaint (e.g. missed clean, poor quality, etc), sales leads, contract start-up, or any other process requiring internal tracking.

St	Code	Description	Group	Priority
	C-ATT	Cleaning Attendance issue	CC - Customer complaint	1 - High
	C-QLY	Cleaning Quality issue	CC - Customer complaint	1 - High
	Q-NEW	Quote/Sales - New Business	QR - Quote / Sales request	
	Q-WRK	Quote/Sales - Additional Work	QR - Quote / Sales request	
	C-INT	Cleaner (internal) reported fault	IN - Internal Issue	2 - Medium

In addition to a *code* and *description* the following fields can be defined:

SR group – this must be defined

Priority – this can optionally be defined here (in which case it can be overridden on the service request) or can be defined when entering the **service request**

Initiation AR list – **AR types** (see below) can be grouped into **AR lists** (see below) which can optionally be associated with a **SR type** here; if so, then on creating a new **service request** for this **SR type**, these **AR types** are automatically pulled into the service request.

Closure AR list –**AR types** (see below) can be grouped into **AR lists** (see below) which can optionally be associated with a **SR type** here; if so, then on completing a **service request** for this **SR type**, these **AR types** are automatically pulled into the service request.

Force closure notes – will force notes to be entered when the service request is completed

Action Requests

Action requests belong to **service requests** – thus a **service request** might have many **action requests** which will be derived from an **AR list** which consists of one or more **AR types**.

AR TYPES

An **AR type** details the lowest level of action required:

General tab

The following information can be defined on an **AR type**:

Nature – this must be defined and determines how this specific **AR type** will be handled (or not) within the system. The following options are available:

- *Manual action* – all actions are manually undertaken by the user
- *Email* – an 'Email' tab will be prompted on the **AR type** (see below)
- *Printed document* – a 'Print' tab will be prompted on the **AR type** (see below)
- *Alert* – an 'Alert' tab will be prompted on the **AR type** (see below)
- *Data form request* – a **data form** can be raised from the resulting **action requests**
- *Workbill request* – an ad-hoc **workbill** can be raised from the resulting **action requests**
- *QA request* – an ad-hoc **QA** can be raised from the resulting **action requests**
- *Staff training request* – a **staff training form** can be raised from the resulting **action requests**
- *Stores order request* –   a **stores order request** can be raised from the resulting **action requests**

Priority – this must be defined

Email tab

This tab is only displayed when the *nature* of an **action request** is 'email':

Document template – a **document template** must be selected; the relevant attachment type permissions and document store must also have been setup

The email can be optionally flagged for '*Send to SR contact*' and/or '*Send to business analysis user at level*' – in the latter case the appropriate **business analysis** level must be selected, so this would be a level containing a part of the management structure and the associated user for the resulting analysis code must have an email address defined.
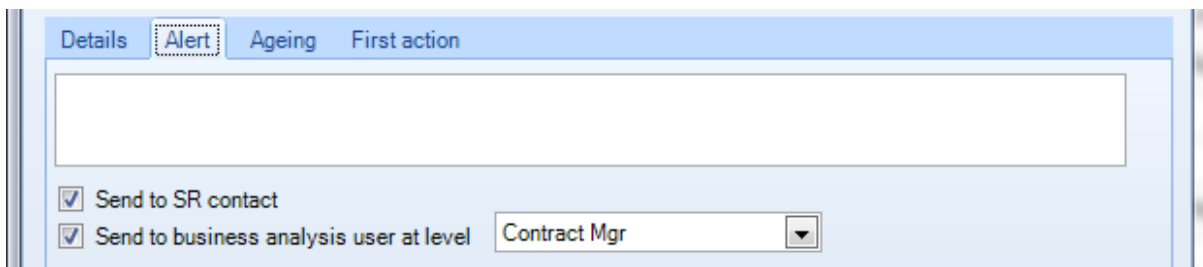
Print tab

This tab is only displayed when the *nature* of an **action request** is 'printed document'. A **document template** must be selected and the same optional flags are available:
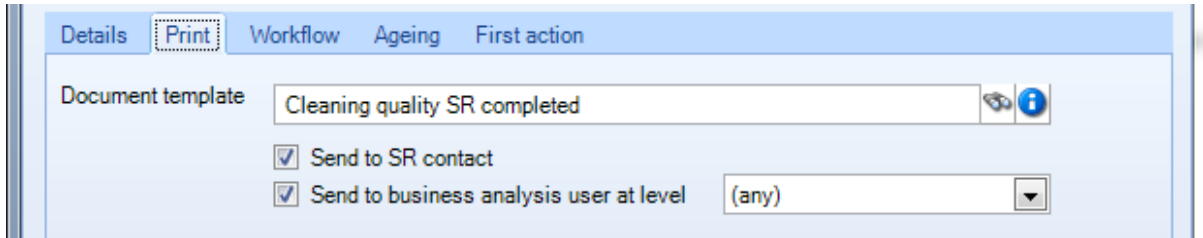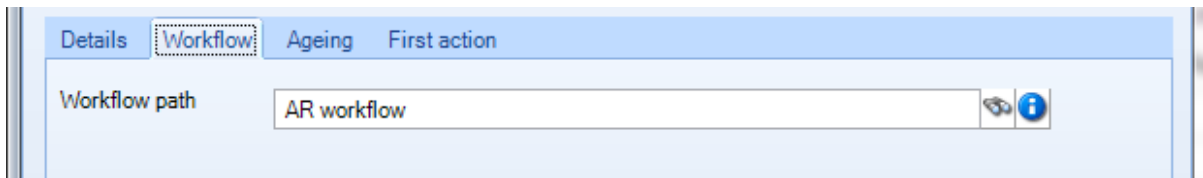

Alert tab

This tab is only displayed when the *nature* of an **action request** is 'alert'. The '*text*' for the body of the alert can be optionally entered and the same optional flags are available:


Workflow tab

This tab is available on all **AR types** apart from those of an alert *nature*

Workflow path – a valid **workflow path** (of 'Action Request' **workflow path type**) can be optionally selected; if selected, the resulting **action request** will be sent through workflow to the relevant user.

Ageing tab

Ageing can be optionally added to **AR types** of any 'nature', with new rows added by simply typing into the final asterisked row or deleted via the **Remove** button:
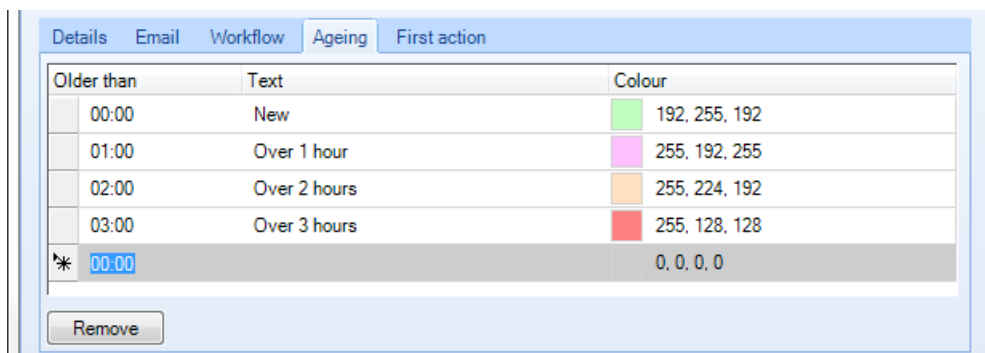
Older than – length of time in hours and minutes

Text – description for the length of time which will appear on the resulting **action request**

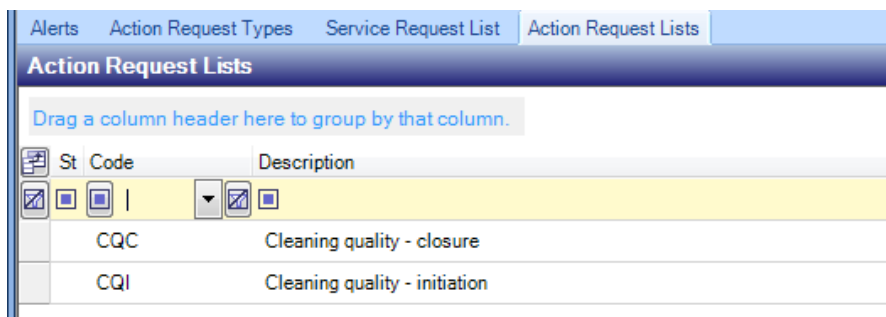*Colour* – optional colour representation of the ageing

First action tab

A first action can be optionally added to **AR types** of any 'nature' instead or as well as the ageing defined at '**action request**-level' – this is a specific action after a set time:
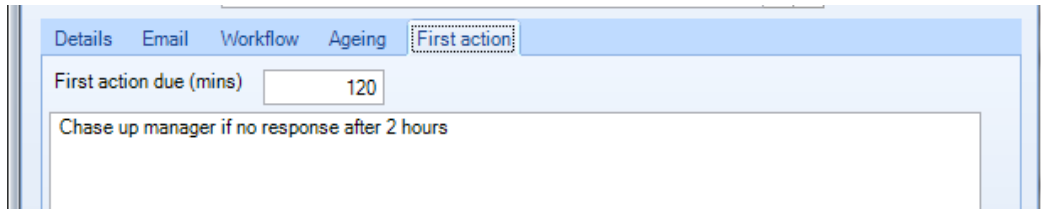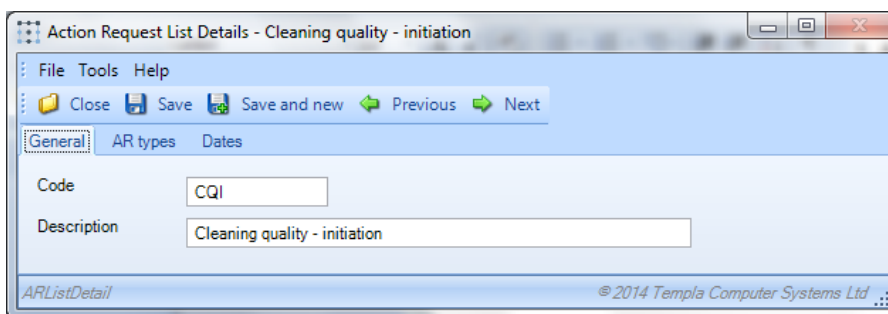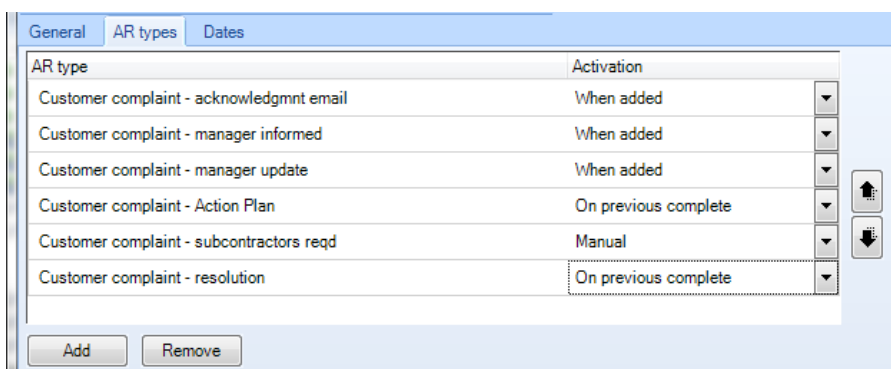

AR LISTS

AR types are grouped on to **AR lists** which are assigned to **SR types** (see above):

On creating a new **AR list**, a *code* and *description* needs to be defined on the 'General' tab:

n the 'AR Types' tab, **AR types** can be added/removed using the **Add** or **Remove** buttons:

Activation – when adding AR types to the AR list their activation can be set as follows:

- *When added* – the system will automatically activate this **AR type** when this **AR list** is used within a **service request**
- *On previous complete* – the system will automatically activate this **AR type** upon completion of the previous **AR type** on this **AR list** within a **service request**
- *Manual* – the system will not automatically activate these **AR types**; rather the user will need to manually activate (or remove) these **AR types**, as required

In all cases, *activation* of the **AR type** (be this automatic or manual) will trigger the start of any ageing process and the countdown to any 'first action'.

ADDRESS BOOK (FOR HELP DESK)

It is anticipated that the **address book** is the option most customer service staff will use by default to add, update and review **service requests**, be these for cleaning complaints, sales leads, contract start-ups, etc. When first entered the address book will be blank but clients and/or suppliers and/or sites and/or employees can be added:
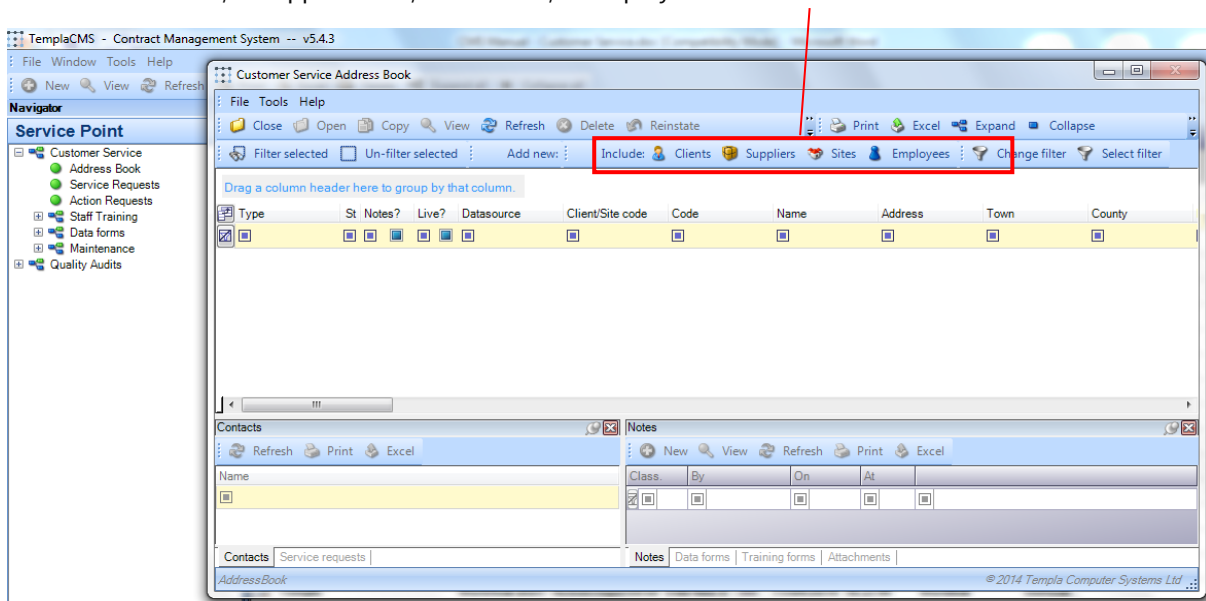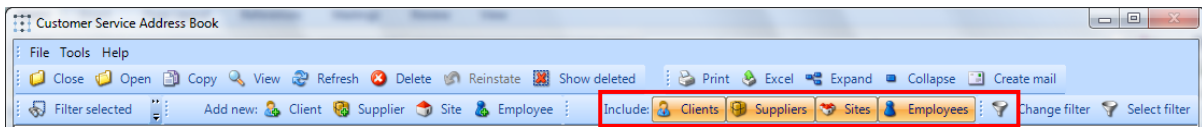

Once added, the buttons in question are highlighted with the resulting grid of contacts grouped, filtered and/or sorted as required:
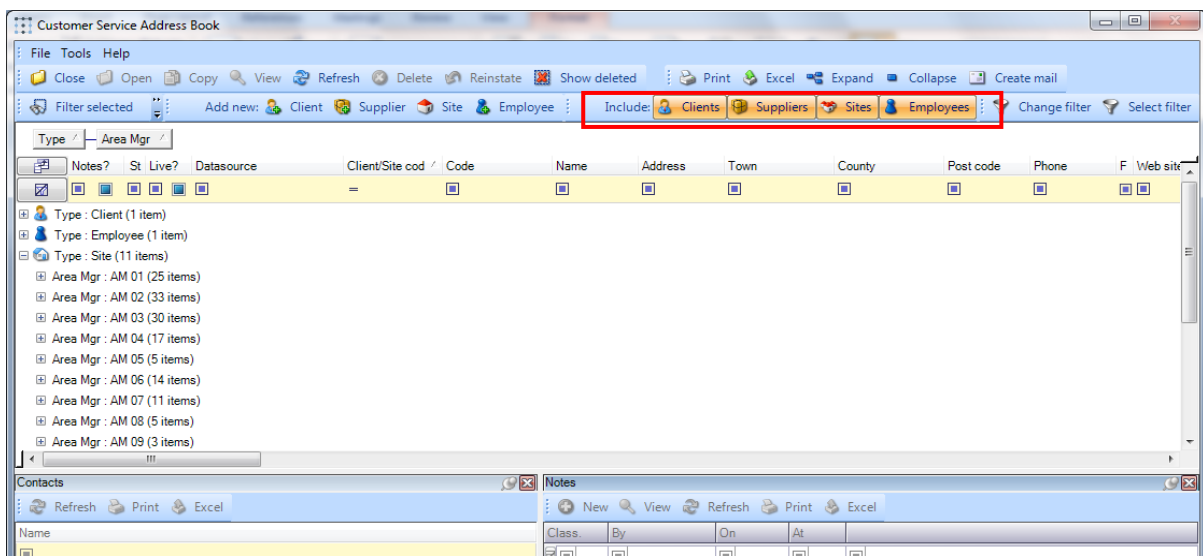
Alternatively, the **Change filter** button can be used to filter the resulting grid:
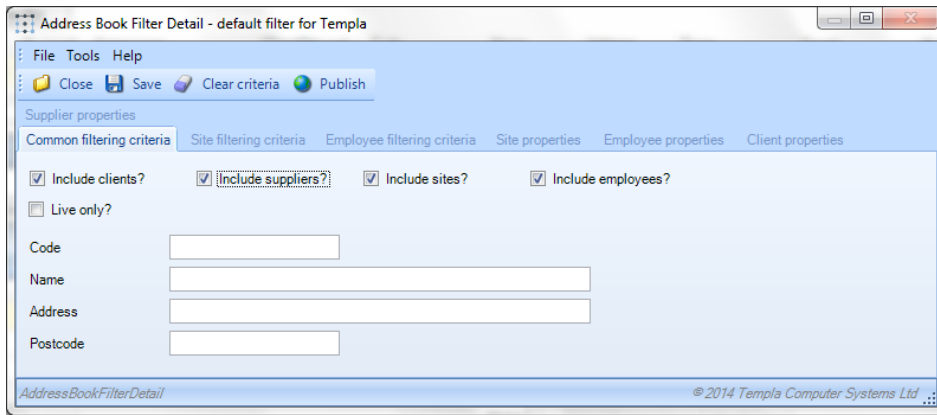

New 'prospect' clients, suppliers, sites or employees can also be directly added:

Highlighting any row will change the contents of the two tabs at the bottom to show that item's contacts or service requests (bottom left) and their notes, data forms, training forms and attachments (bottom right):
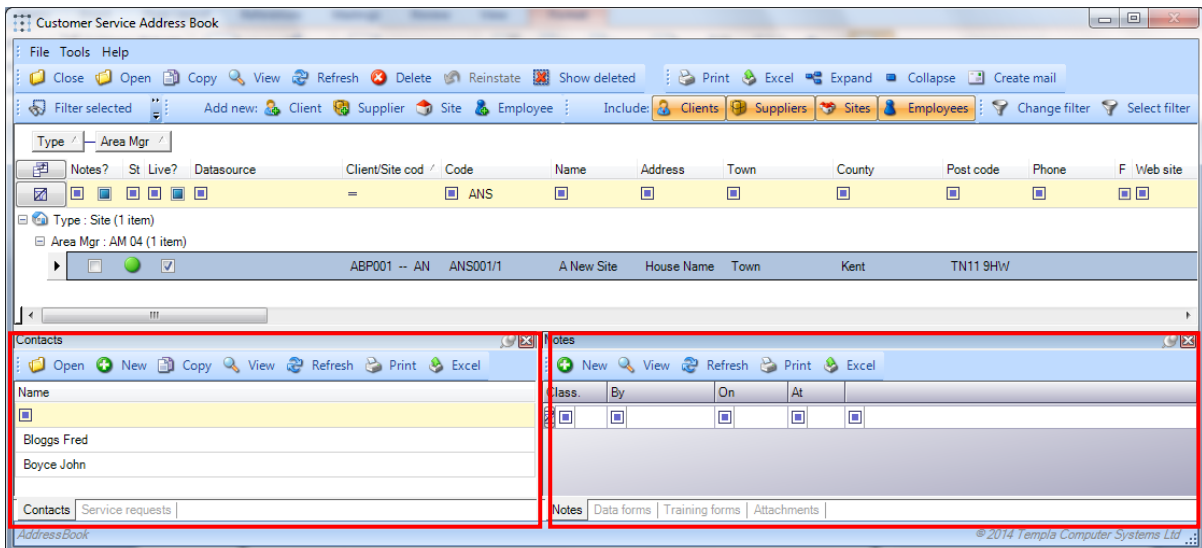
The tabs can be changed and the any item displayed double-clicked on to enable drilldown into the respective items i.e. service request, data form, training form, etc:
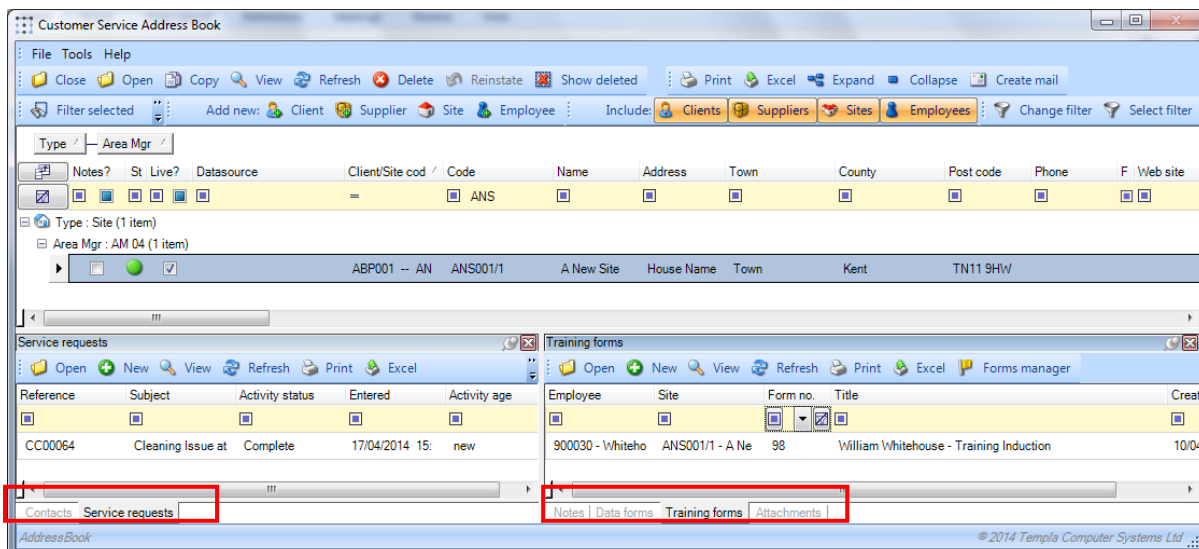
In addition, the main item – i.e. client, supplier, site or employee – can be double-clicked on to enable drilldown:
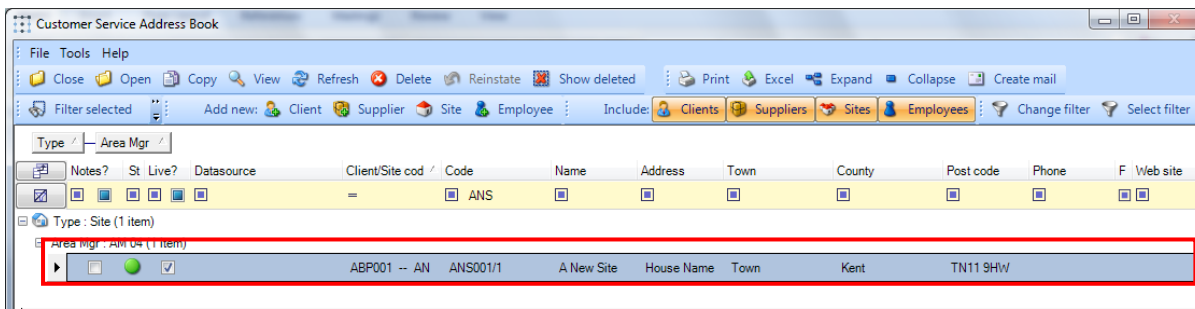

The resulting list of filtered items – i.e. client, supplier, site or employee – can be sent to **Print**, exported to **MS Excel** or the **Create Mail** button used to send/email a document to the selected items, e.g. all site contacts in an area to inform them of a change of contract manager, all selected employees, etc.   The **Create Mail** button also exists on the other main TemplaCMS lists – i.e. clients, suppliers, employees and contacts – and its full use is part of the Document Management functionality within TemplaCMS.

SERVICE REQUESTS

The **service requests** option is a list of service requests and, as such, would be the list that customer service staff would work from if they are not using the **address book** option.

Service Request – List and Filter
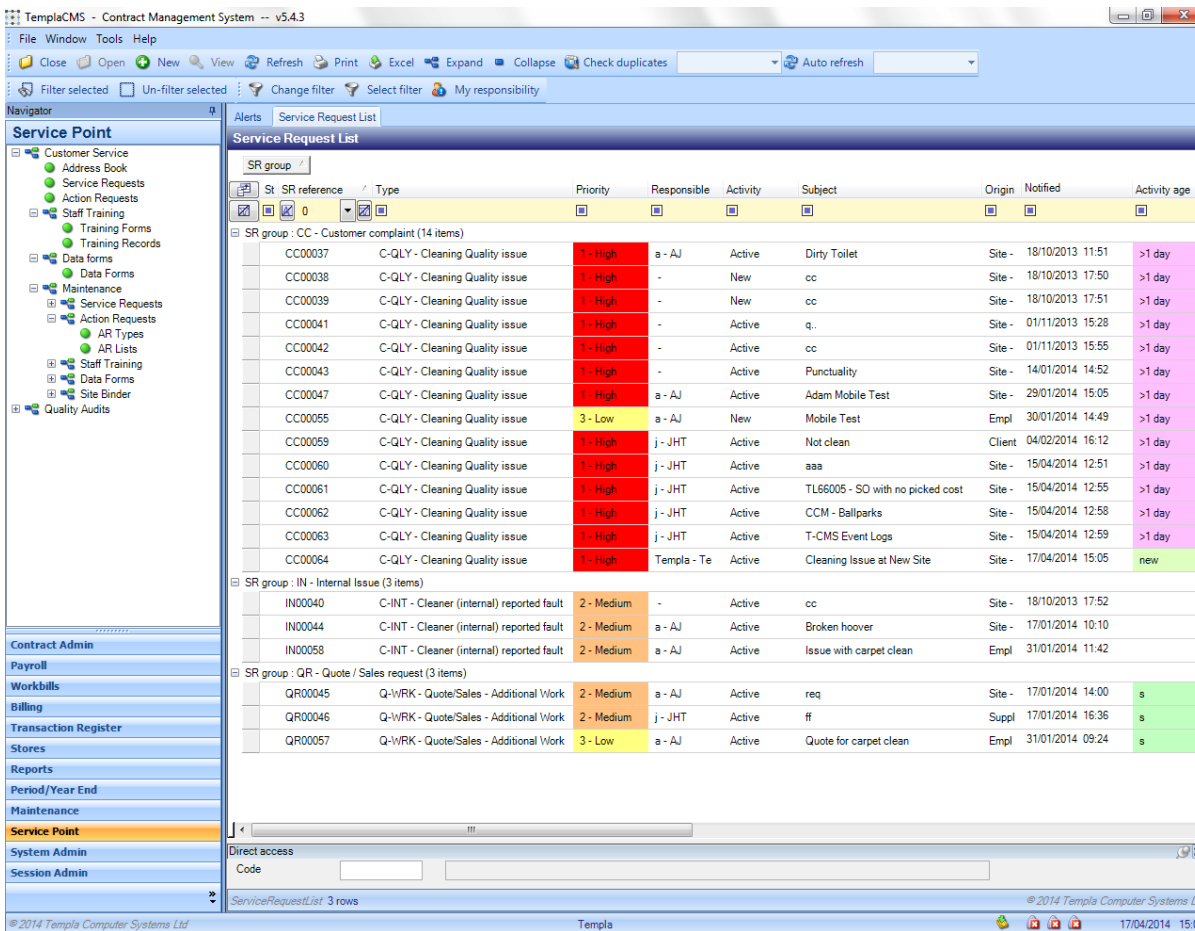
The above list shows several features:

- *Grouping* – in this case by **SR group**, with the different prefix for each, i.e. CC, IN, QR
- *Priority* – this highlighting has either defaulted from **SR type** on to the **service request** (and optionally then amended) or it has been manually entered when the **service request** was created
- *Responsibility* – currently assigned user
- *Activity Age* – this highlighting stems from the oldest outstanding **action request** where the lapsed time is compared to the **AR type**'s 'ageing criteria'

This filterable list allows the following **service request** specific filters to be used:
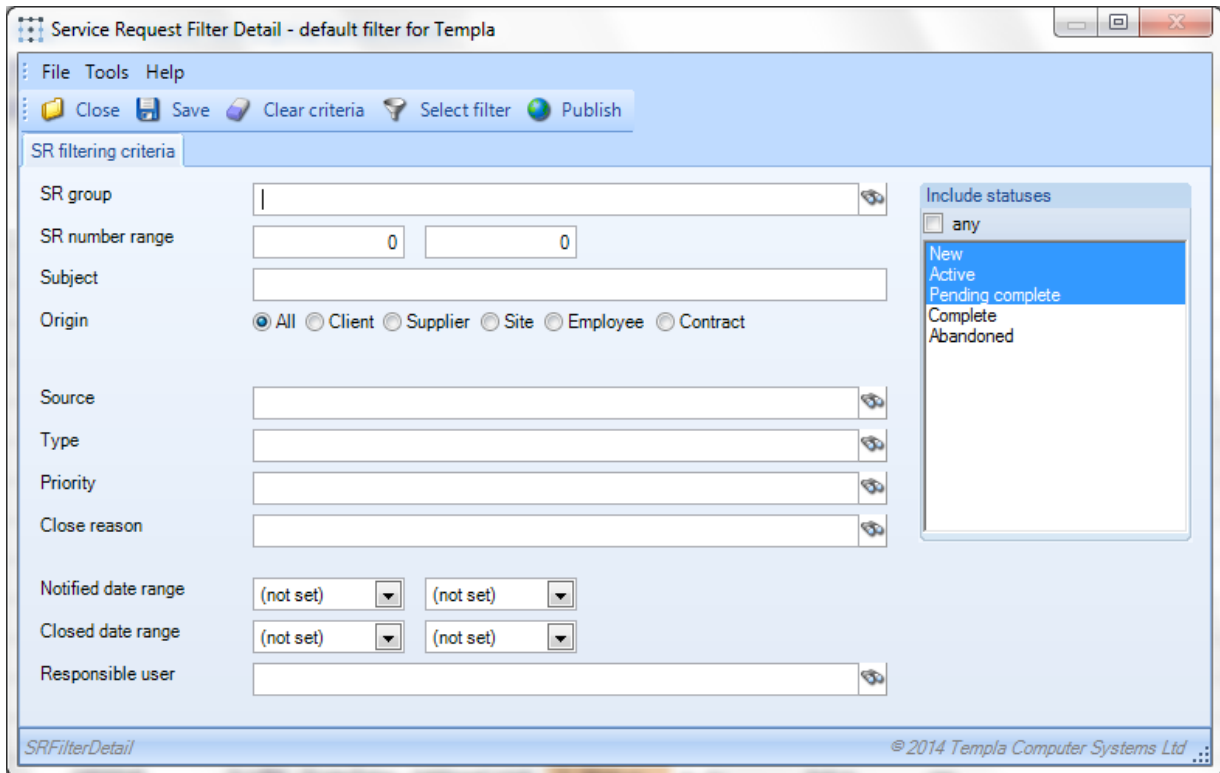
The above is the default settings that are set when the **Clear Criteria** button is used.   Most of the filtered options are self-explanatory but the following clarifications are provided:

- *Subject* – this is a string search not an exact match
- *Type* – this is the **SR type**
- *Priority* – this is the **SR priority**
- *Notified date range* – this is the date the service request was notified which might not be the date the service request was entered into the system

Service Request

SERVICE REQUEST – NEW

A **service request** can be created from the Service Request, the Address Book or 'dragging & dropping' an e-mail onto the list or on to an existing item:
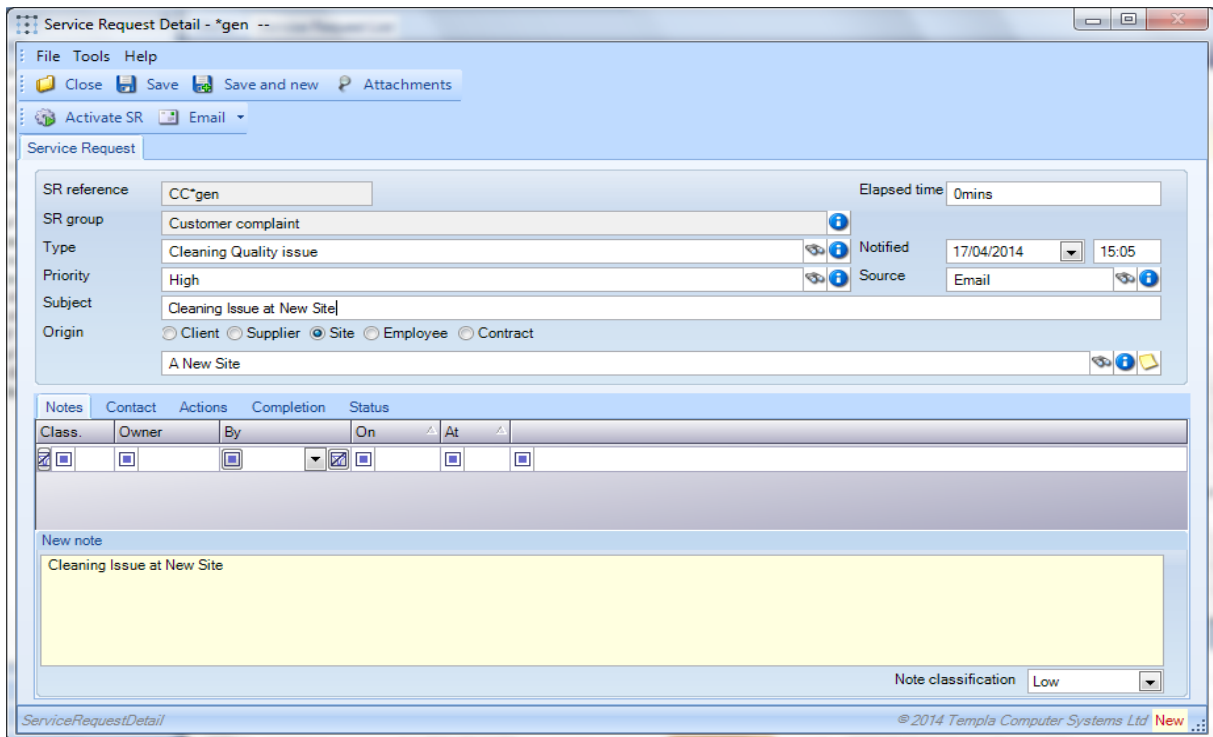
(SR) Type – this must be entered and will result in the SR reference prefix and **SR group** (both above) being completed, plus the **(SR) priority** if it has been defined on the **SR type**.

*(SR) Priority* – this must be entered; if defaulted from the **SR type** it can be overridden

(SR) Source – this must be entered

Subject – this must be entered and will automatically default as the first 'note' (below)

Origin – this must be selected – i.e. client, supplier, site, employee or contract – and then the relevant client, supplier, site, employee or contract must be entered

Elapsed time – this is the total elapsed time for the service request and is never reset; the SR *activity ageing* (which can drive the colour-coding) is reset every time an SR is updated.

Notes Tab
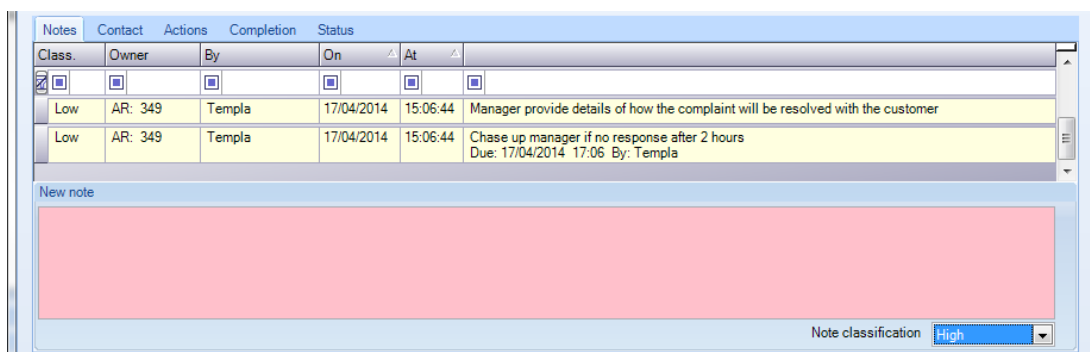
Notes can be added at any point, and their importance set based on the 'Note classification' (as elsewhere in TemplaCMS); in addition, these non-system notes can be filtered via the grid.

Contact Tab
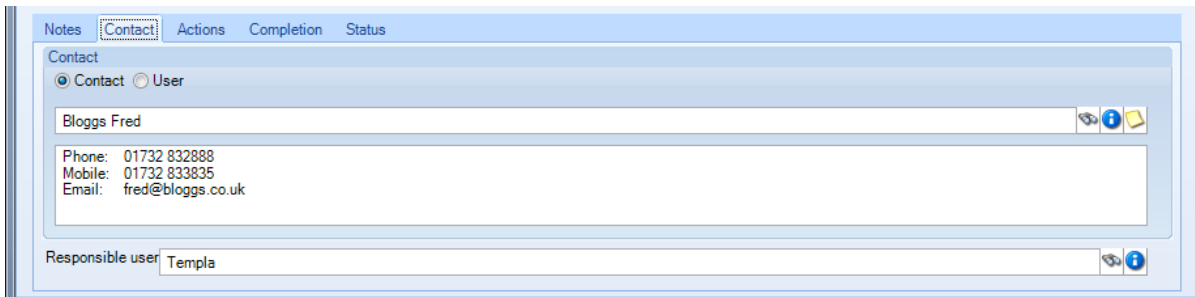
Contact details will default from the current user but can be amended to another user (e.g. the area manager if he has noticed an issue), or amended to be a contact, in which case any available contact for the origin – i.e. client, supplier, site, employee or contract – can be selected, e.g. the site's supervisor who reported the issue. The contact's contact details – i.e. phone, fax and email – are always defaulted into the main text body but can be added, amended or removed.

Actions Tab

When a service request is raised, no **action requests** will exist on the 'Actions' tab until the **Activate SR** button has been pressed:
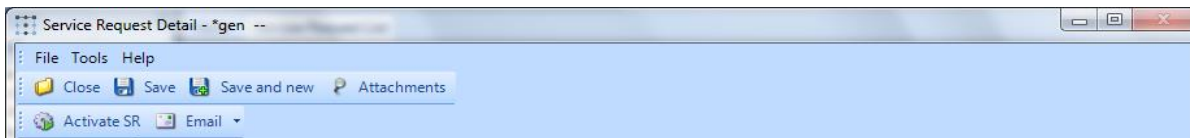
This will result in the **action requests** from the 'Initiation AR list' on the **SR type** appearing:
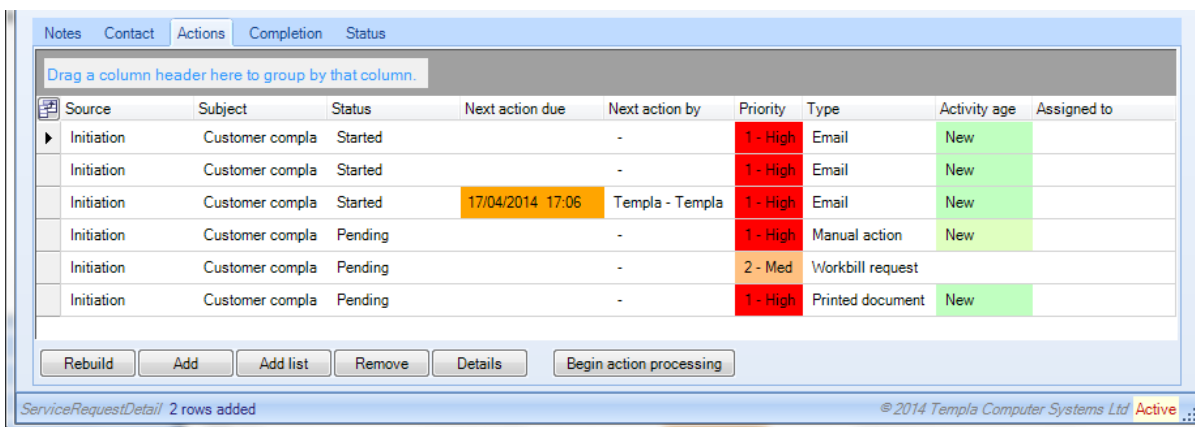
The 'status' of each **action request** will be set based on the 'Activation' setting on the **AR list**, whilst the 'next action details', 'priority' and 'type' will be set from the **AR type**. The AR *activity ageing* (which drives the 'activity age' colour-coding) is reset every time an AR is updated, thus highlighting how long it is since the AR was updated.

Additional **AR lists** can be manually added to a service request using the **Add list** button or individual action requests can be added or removed using the **Add** and **Remove** buttons.

The **Rebuild** button can be used to automatically remove and re-add the 'Initiation AR list' defined on the **SR type** – this will warn the operator as follows:
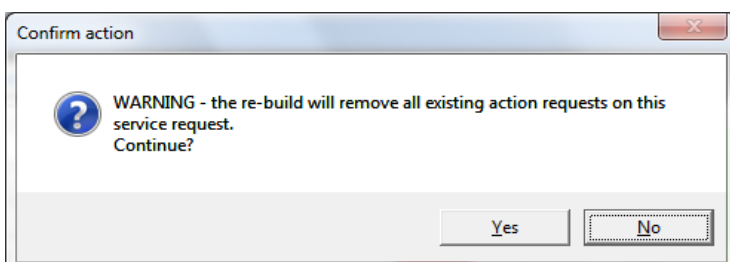
Action Request – Detail

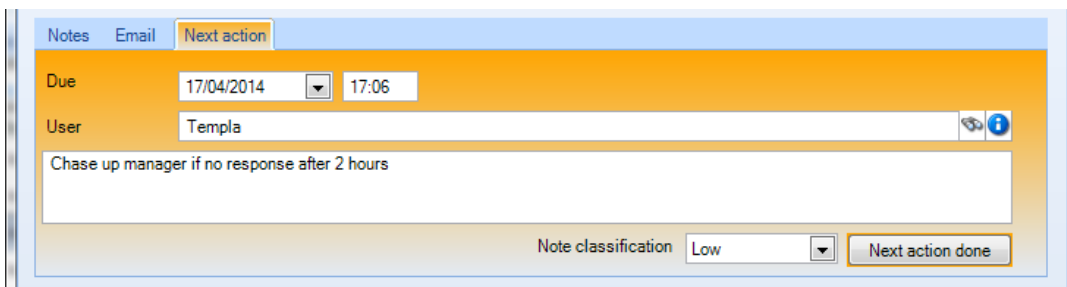The **Details** button takes the user into any action request:
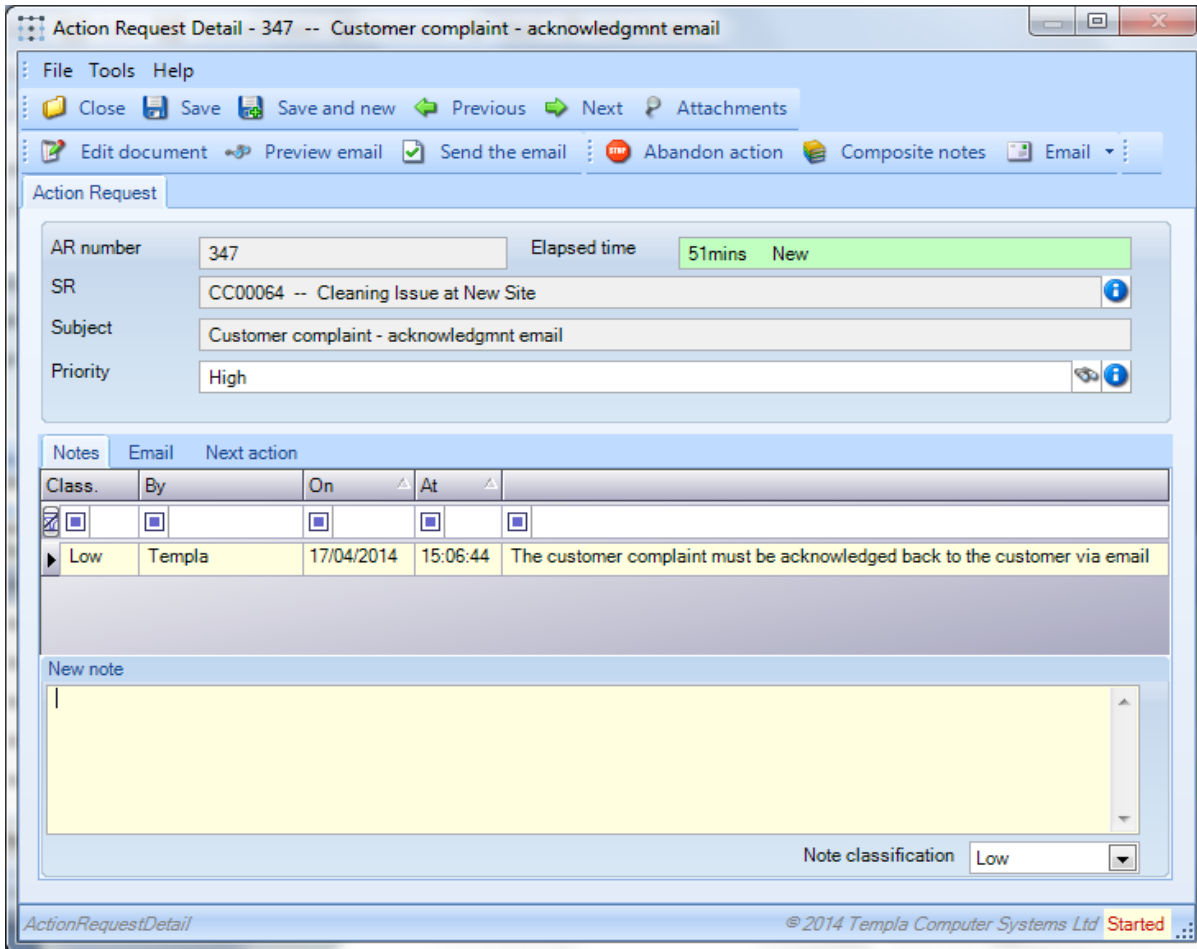
From here the priority can be amended, further notes added and, depending on the *nature* of the **AR type**, more specific options will be available as buttons at the top of the screen (e.g. Edit document) and as tabs at the bottom of the screen (e.g. email required contacts):

When adding a note, a 'Note classification' can be selected which contains a description and colour, e.g. Low (Pale Yellow), Medium (Pale Orange) and High (Pale Red). To edit these, there is a menu option called 'Note Styles' on the System Admin > Miscellaneous menu.

Elapsed time – this is the total elapsed time for the action request and is never reset; the AR *activity ageing* (which can drive the colour-coding) is reset every time an AR is updated.

Email details

A list of users and client/site/supplier contacts will be displayed on the email tab, if relevant; these can be selected for inclusion or omission before emailing out the document:
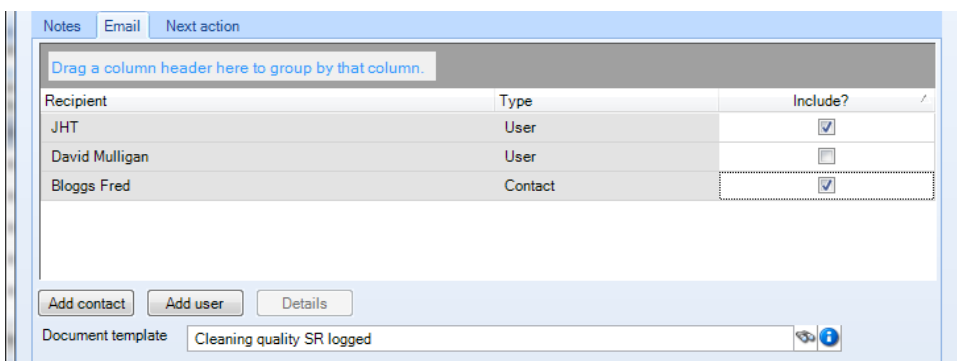
Next action

If the **AR type** has a 'first action', the operator will be defaulted into the 'Next Action' tab:

Alternatively, the operator can manually enter a 'next action' date/time. *Next action* details appear in green if in the future, orange if today and red if in the past.
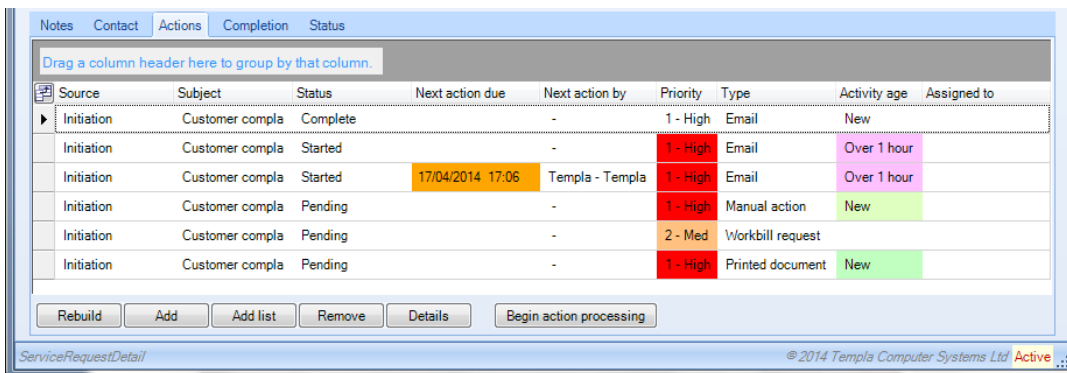
For each action request, the relevant action has to be completed, i.e.:

- For **action requests** with a type (i.e. *nature* of the **AR type**) of 'alert', 'email' or 'printed document', the required users or contacts must be flagged and the document sent via the 'Detail' screen using the relevant button
- For **action requests** with a type (i.e. *nature* of the **AR type**) of 'manual', the operator must either remove the action request if it is not required or via the 'Detail' screen use the **Begin Action** button
- For **action requests** with a type (i.e. *nature* of the **AR type**) of 'Workbill', 'Stores Order Request', 'Staff training', 'Data form' or 'QA', the operator must access the 'Detail' screen to create the item via a button, e.g. **Create Workbill**, **Create QA**, etc

Alternatively, the **Abandon Action** button can be used to abandon an action.
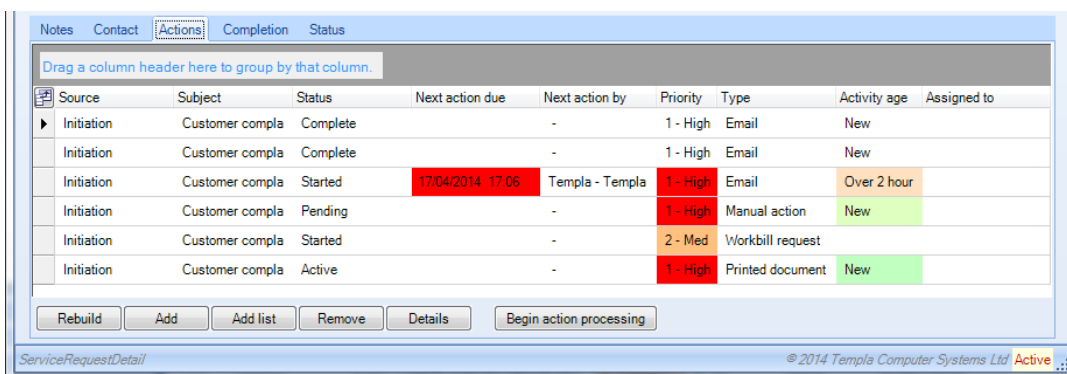
Action Request – progress

As time passes, the activity age of each action request will have its *text* and *colour* updated:

Or its *status* updated and the activity age removed once the **action request** is completed:

SERVICE REQUEST – ABANDON

Once the **Activate SR** button has been pressed, the **Abandon SR** button appears instead:
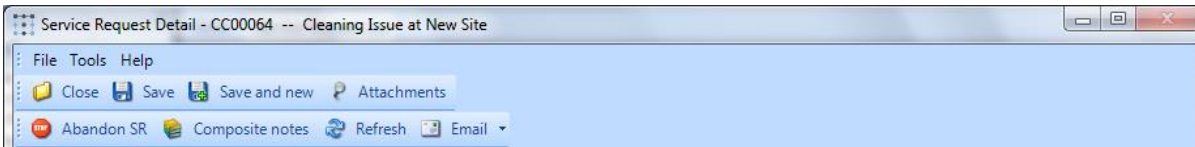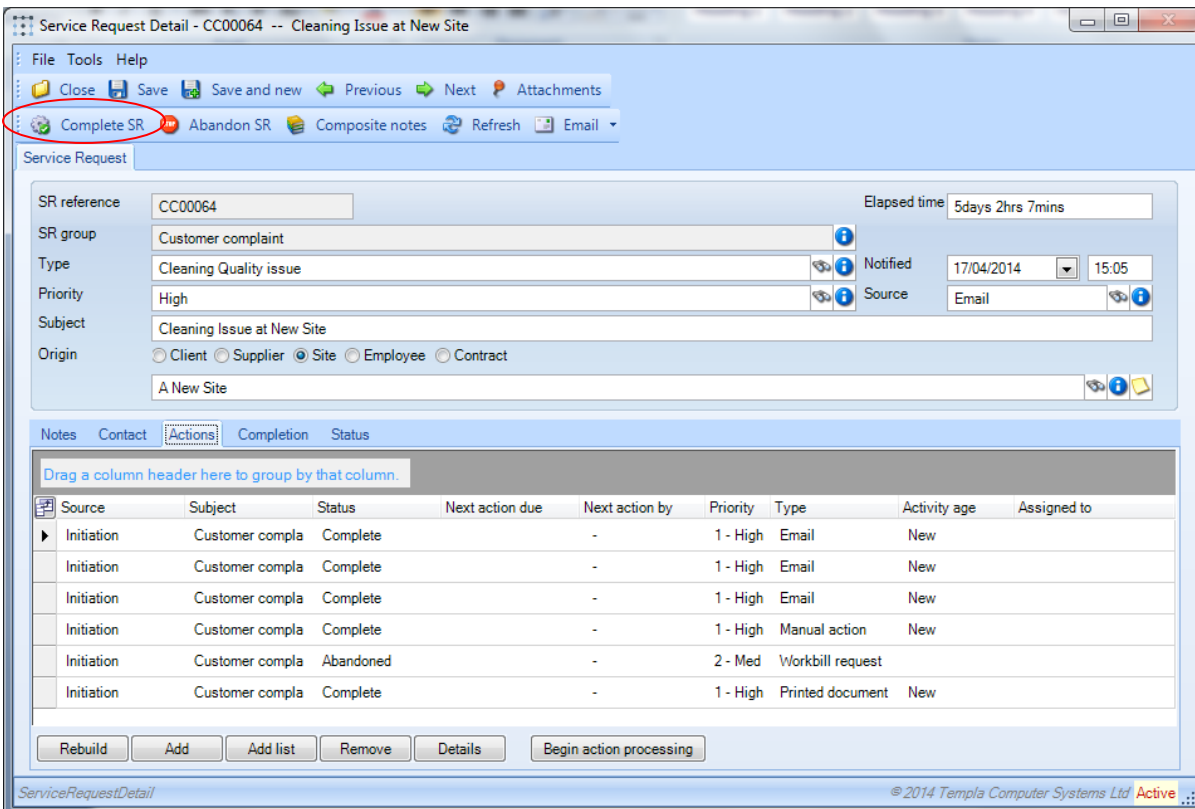

This will enable the **service request** (as a whole) to be abandoned and will force the operator into the 'completion' tab where all fields must be entered:
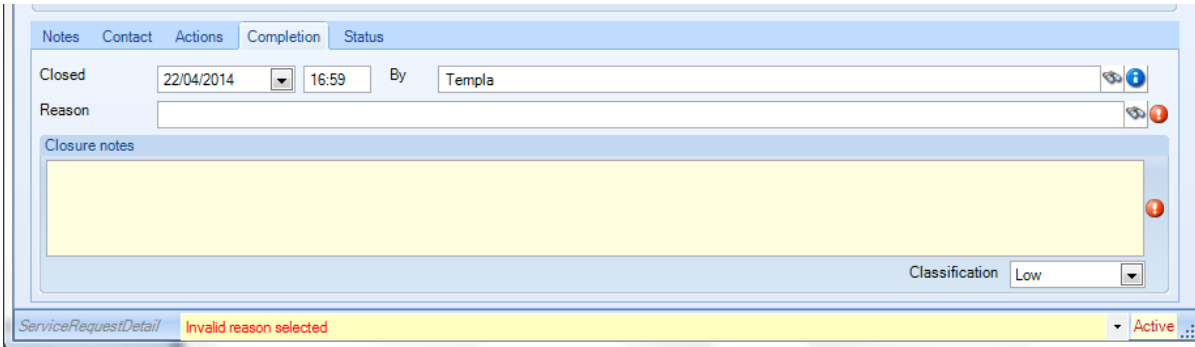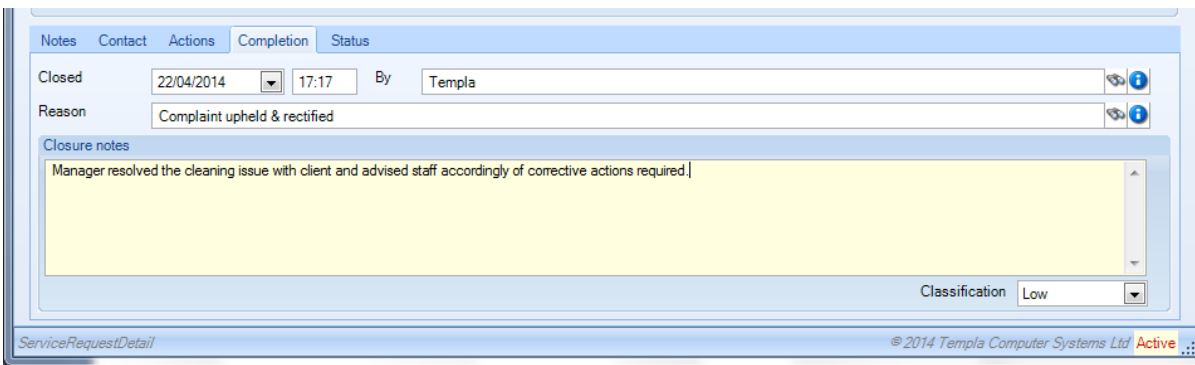

SERVICE REQUEST – COMPLETE

Once all **action requests** are completed, abandoned or removed then the **Complete SR** button will become available:

Then the **service request** can be completed via the 'Completion' tab:

Closed – this must be entered but can be past (or future) date/time.

By – this must be entered; it defaults to the current user but can be overridden

(SR) Reason – this must be entered

Closure notes – these must be entered

Closure AR list – if a **closure AR list** was defined on the **SR type**, then closing the **service request** will result in the **closure AR list**' **AR types** being automatically added to the **service request** as **action requests**, plus the above 'completion' tab details being removed. These new **action requests** will need to be processed in the same way.

The **service request list** will be updated accordingly:
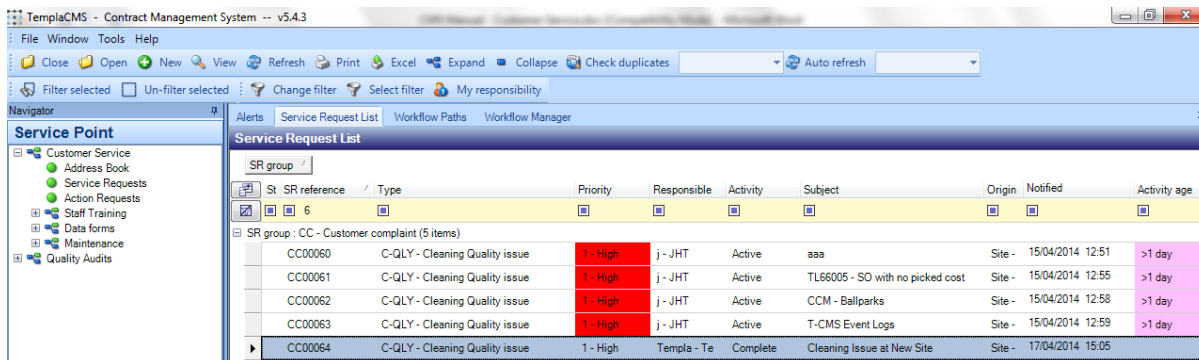
SERVICE REQUEST – REACTIVATION

Any completed **service request** can be re-activated by re-accessing it and then using the **Activate SR** button:
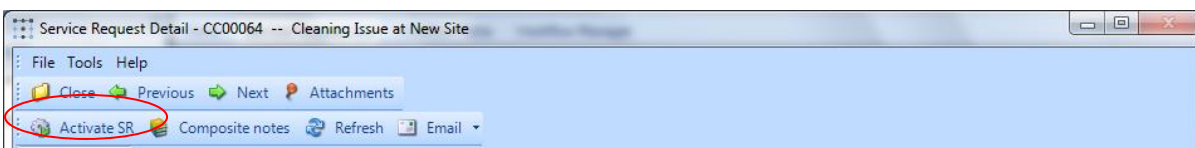
In this way, any **service request** – be it for a sales request, issue or complaint – can be re-opened at any point and then further **action requests** added, either individually via the **Add** button or collectively via the **AR list** button so that in this way the whole service request cycle could be re-done from the beginning if so required.

SERVICE REQUESTS – COMPOSITE NOTES

The **Composite Notes** button on the **service request** header details a running log of all notes added in relation to a service request, both at **service request** and **action request** level, and both automatically added system notes and manually added operator notes.

A further **Composite Note** button exists on each **action request** detailing all system and manual notes for that **action request**.

Service Requests – Use/Appearance Elsewhere

QUALITY AUDITS

QA Fault Groups/Codes

A **service request** can be specified on the **QA fault group** or **QA fault code**:
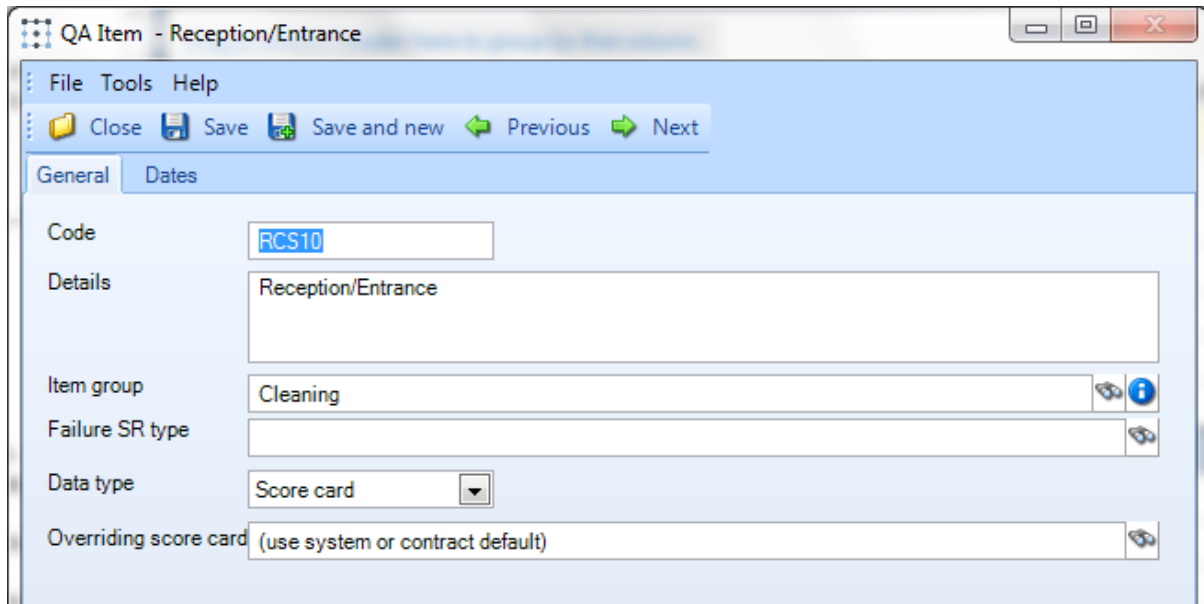
This will force a service request to be created if this **QA fault code** is used when a **QA form** is completed, be this for a failure or as a result of a **QA fault code** being assigned on a non-failure **QA item** – see overleaf.
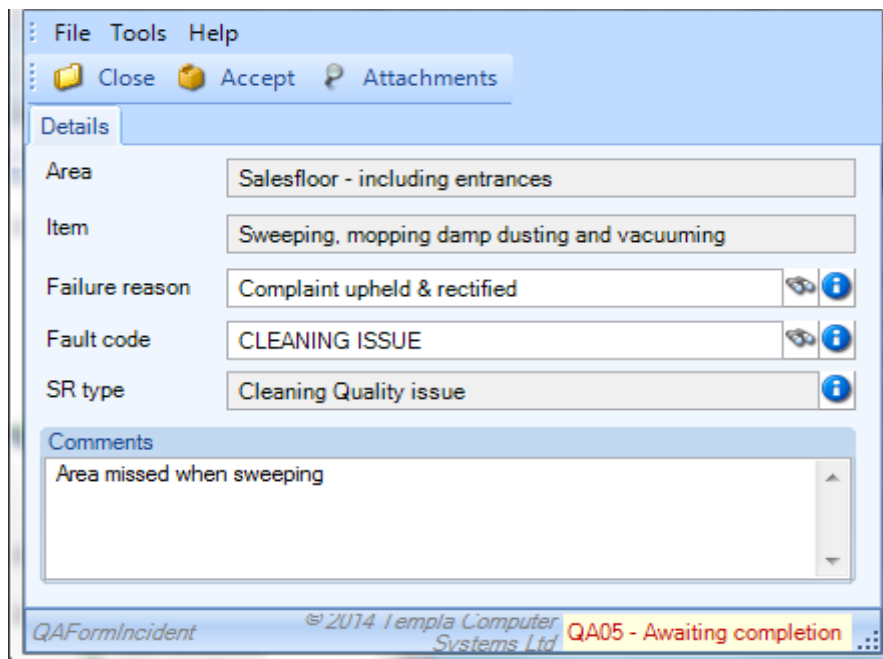
QA items

Alternatively, the QA module, **QA items** can be optionally defined with a 'Failure SR type':

This will force a **service request** to be created if this **QA item** fails on completing a **QA form**:

ACTION REQUESTS

The **action requests** option is a list of action requests and, as such, might be the list that managers or administrative staff could work from if their responsibility was restricted to particular action requests, e.g. HR staff might just view **action requests** where the **AR type** is recruitment. Alternatively, customer service could use this list to monitor the progress of **action requests**, e.g. by AR type, assignee, etc.
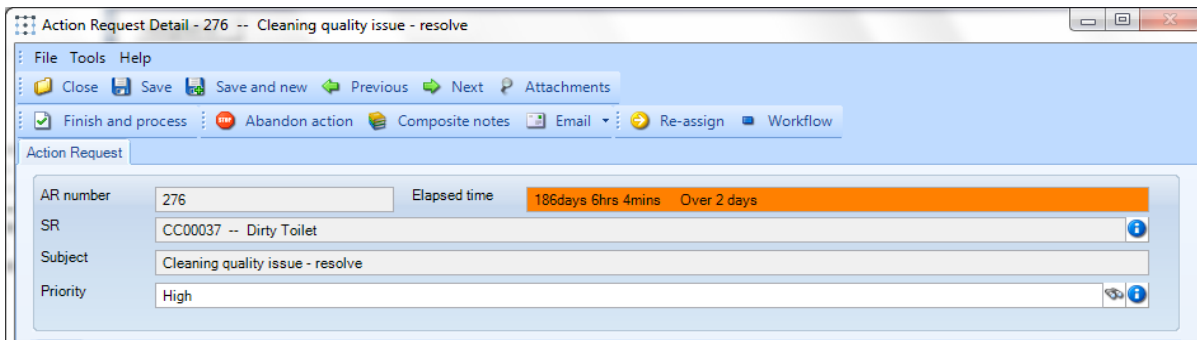
Action Request – List and Filter
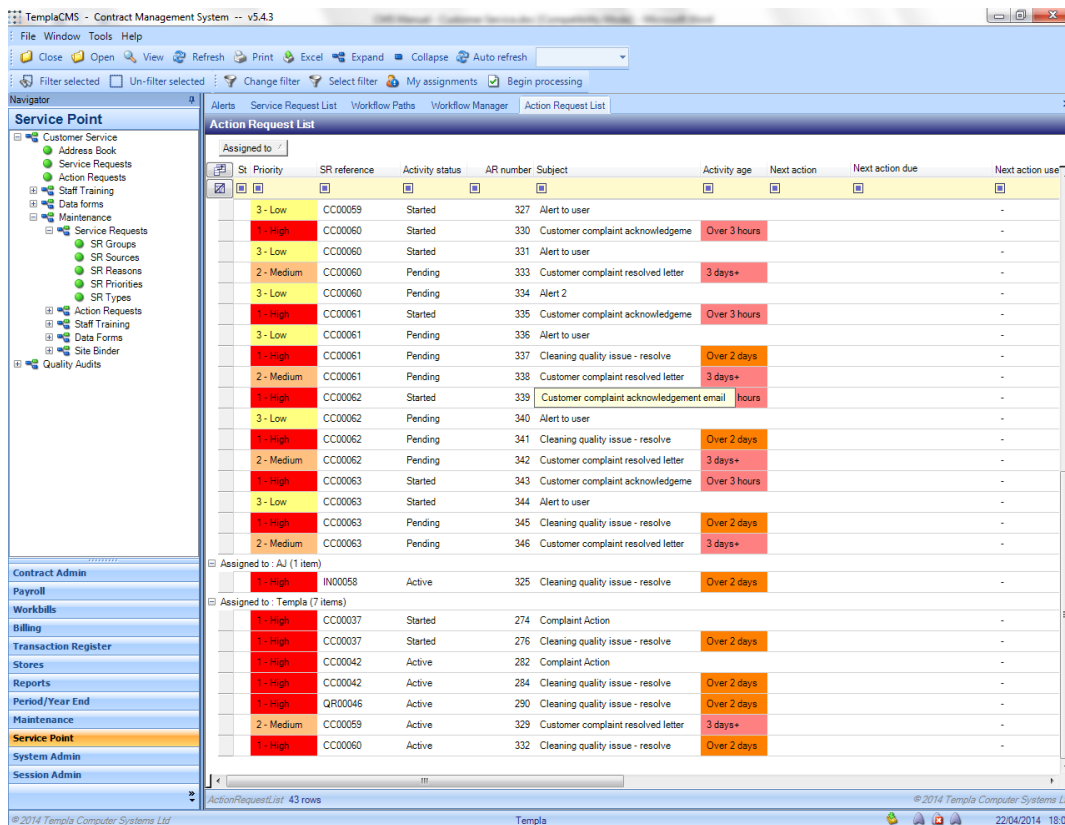
The above list demonstrates the normal grouping functionality within TemplaCMS.

This filterable list allows the following **action request** specific filters to be used:
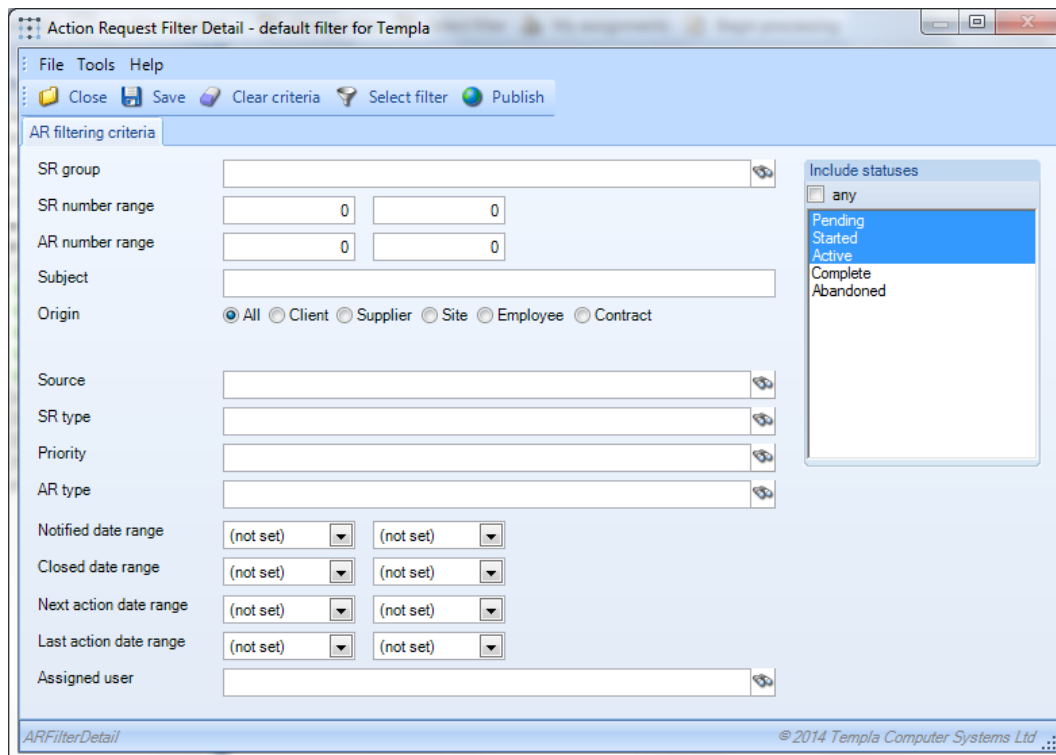
Action Request – Update

Double-clicking on any row will allow the operator direct access into this action request to update, then either **Finish and process** or **Abandon action**:

However it is not possible to add action requests from the action request list or view the underlying service requests to which they relate.

APPENDIX A – HOW TO SETUP A SERVICE REQUEST TYPE

Summary

A **Service Request** consists of one or more steps known as **Action Requests** and therefore the design of a **Service Request type** requires one or more **Action Request types** to be grouped into an **Action Request List(s)** to be used on a **Service Request type**. Within TemplaCMS the design of a **Service Request type** needs to be from the 'bottom-up and, the following steps should be considered when creating **Service Request types**

1. Design your **Service Request type** and its steps (**Action Request types**) first on paper

   NB: This design can be done using the supplied MS Excel template

   NB: it is assumed a Service Request Group, Priorities, Sources and Closure Reasons have been previously setup via the Customer Service > Maintenance > Service Requests menu

Then in **TemplaCMS** to create a new **Service Request Type**:

2. Create the necessary **Document Templates**, if any of the **Action Request types** are to be emailed or printed

3. Create each **Action Request Types** in turn:
   - Ensure the 'Nature' is correctly set
   - If emailing (or printing), enter the relevant **document template**
   - Ensure **ageing** (if entered) is consistent

   NB: this needs to be completed for each step, i.e. each Action Request Type

4. Create an **Action Request List**:
   - Add the **Action Request Types** to the list
   - Set the appropriate activation for each **Action Request Type**

   NB: multiple Action Request Lists can be created using the same Action Requests

5. Create the **Service Request Type:**
   - Assign the **Initiation AR (Action Request) List**
   - Ensure **ageing** (if entered) is consistent

   NB: multiple Service Request Types can be created using the same Action Request List(s)

6. Update any **Document Template's** associated MS Word document:
   - Add the required wording
   - Add any mail-merged fields

Then in **TemplaCMS** to check the **Service Request Type** has been correctly set up, create a **Service Request** (via the **Address Book** or **Service Request List**), activate it and complete all **Action Requests**, checking any resulting emailed **Document Templates**, then complete it.

Design Considerations

- AR types:
  - Common (to all SR types) or specific AR types?
  - Natures: manual, e-mail, print, alert, workbill request, SO request, training form request, etc.
  - Document Management (if email or print)
  - Workflow to other (non-C/Service) TemplaCMS users
  - Priority & Ageing
- AR lists:
  - Opening (or also Closing)
  - Pre-set or ad-hoc
  - AR type activation: manual, when added/opened, on the previous completion

> **NB: multiple actions could be occurring simultaneously, if required**

Schematic, i.e. Design (Service Request Type) and Usage (Service Request)
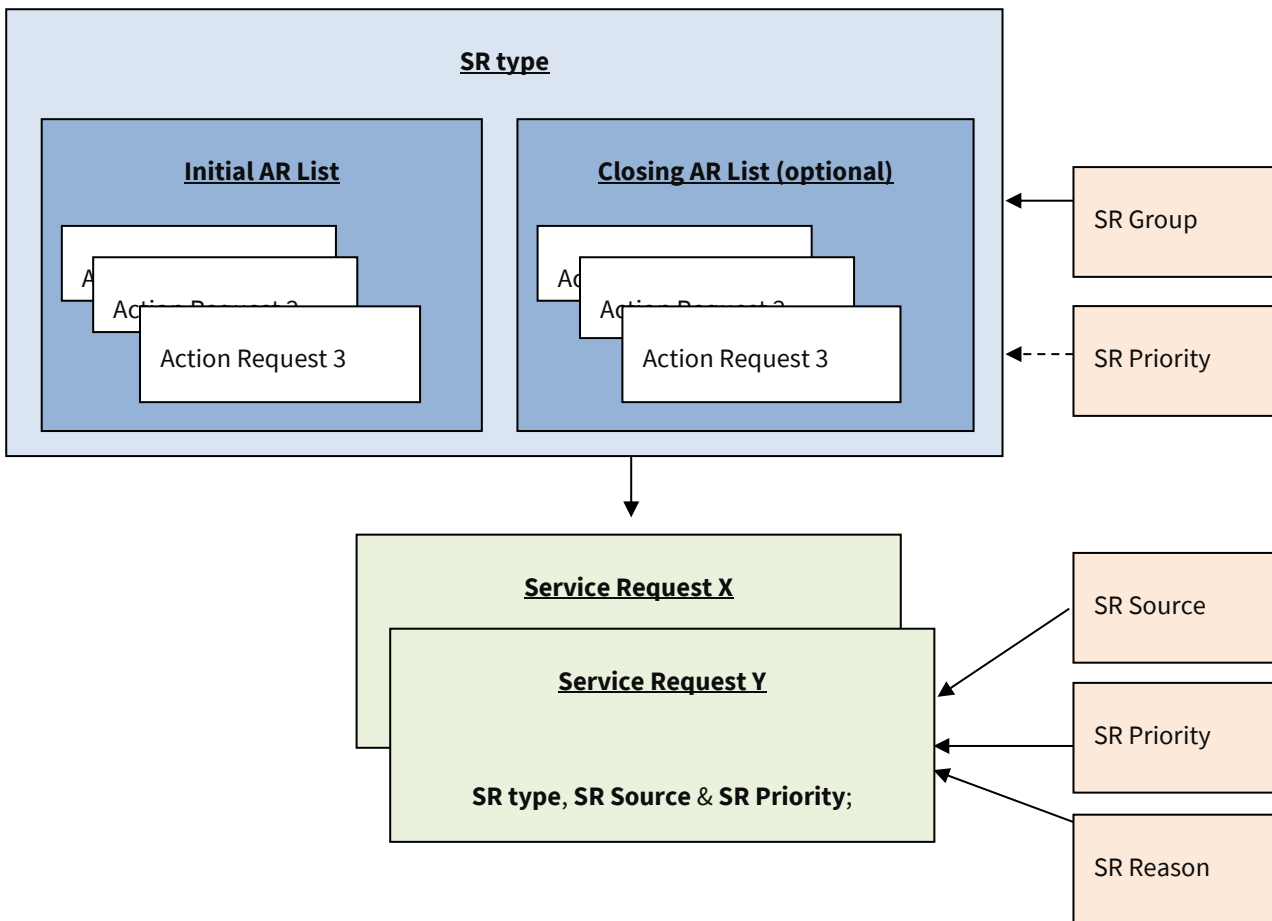
Create Document Template

Via **Maintenance** > **Document Management** menu, access the **Document Templates List.**

Create a **Document Template** – key points being as follows:

- Give it a meaningful code – this will also become the document name
- Assign to a service request attachment type, i.e. SR
- Use **Create Document** to create the MS Word document in the Document Store
    - Once the document is created, save & close it
    - Use **Edit Document** to update a **document template** subsequently – see below
- Click on 'print' or 'email' – this cannot be changed once saved
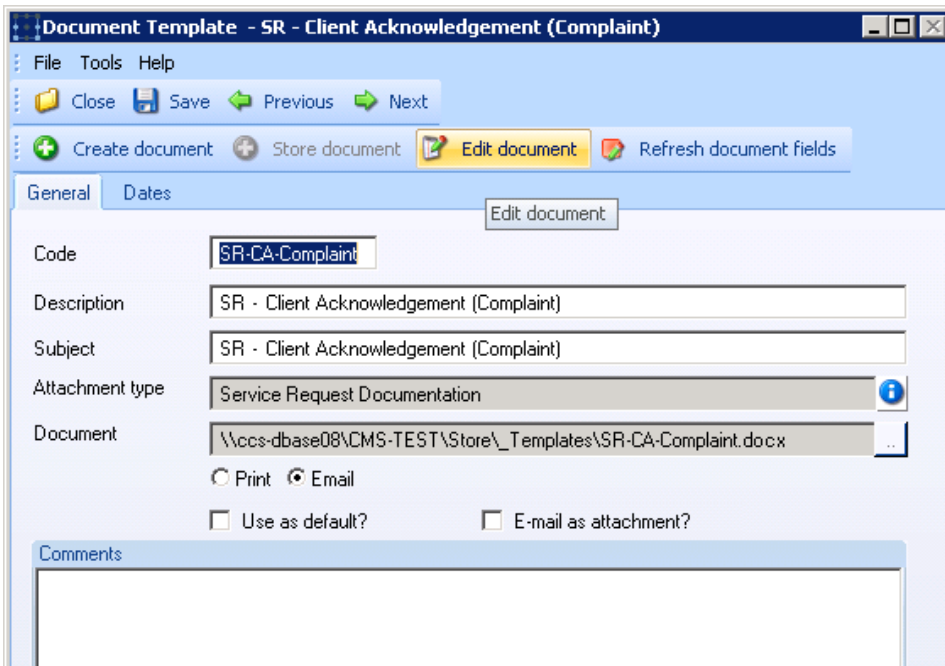
Create Action Request Type

Via **Customer Service** > **Maintenance** > **Action Requests** menu, access the **AR Types** option.

Create an **Action Request Type** – key points being as follows:

- Enter a meaningful code
- Assign the relevant **nature**, i.e. email or manual, being the most likely initially – this cannot be changed once saved
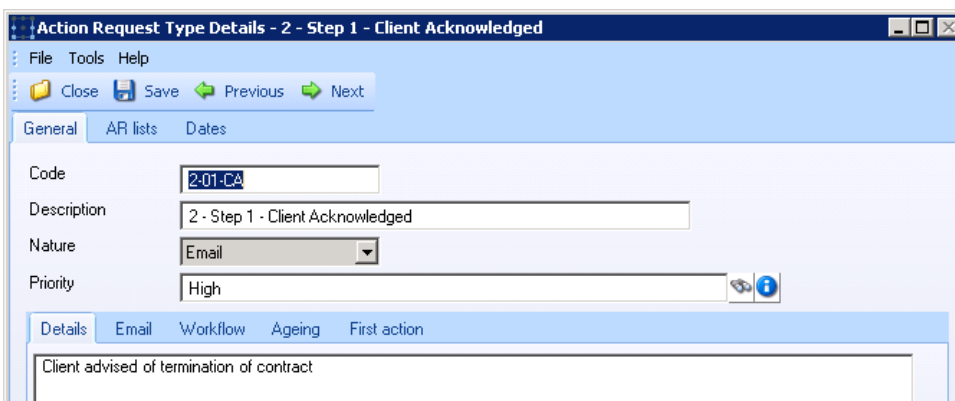
If emailing or printing, assign the **Document Template:**
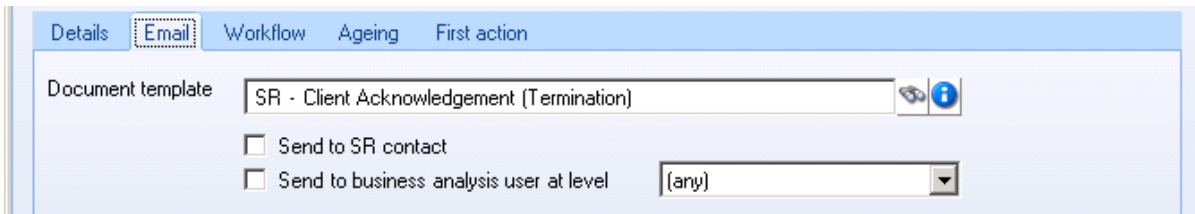
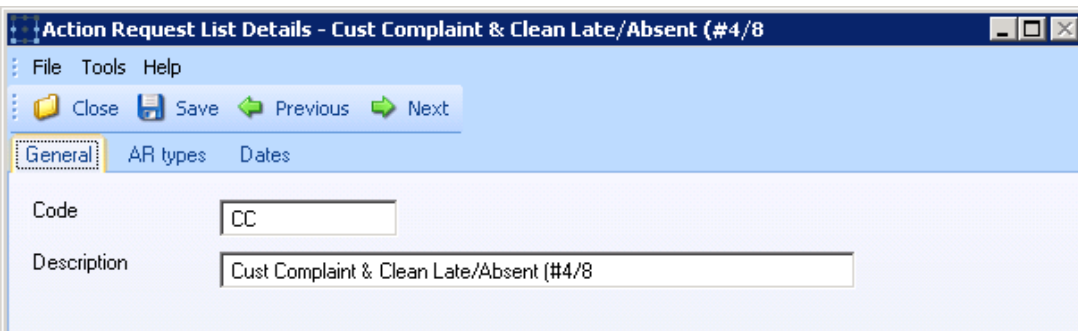Assign (if required) the relevant **Ageing**:
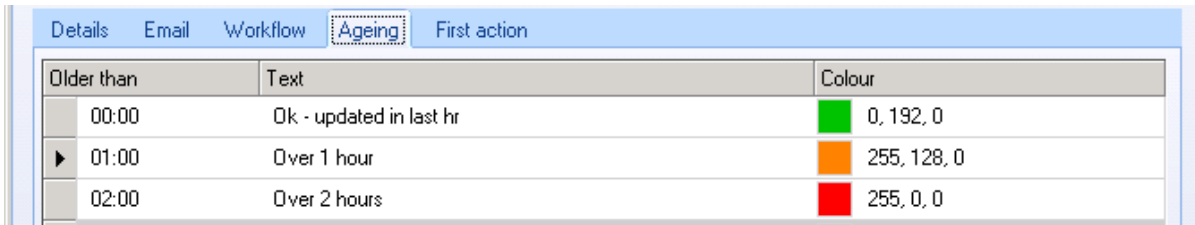
> **NB: to ensure consistency of ageing, it may be better to copy Action Request Types**

Create Action Request List

Via **Customer Service** > **Maintenance** > **Action Requests** menu, access the **AR Lists** option.

Create a **Action Request List** with a meaningful code:

Add the relevant **Action Request Types** to the **Action Request List**, giving each their appropriate activation status, e.g. *When Added* (first) and *On Previous Completion* (for all subsequent **Action Request Types**) being the most common structure:
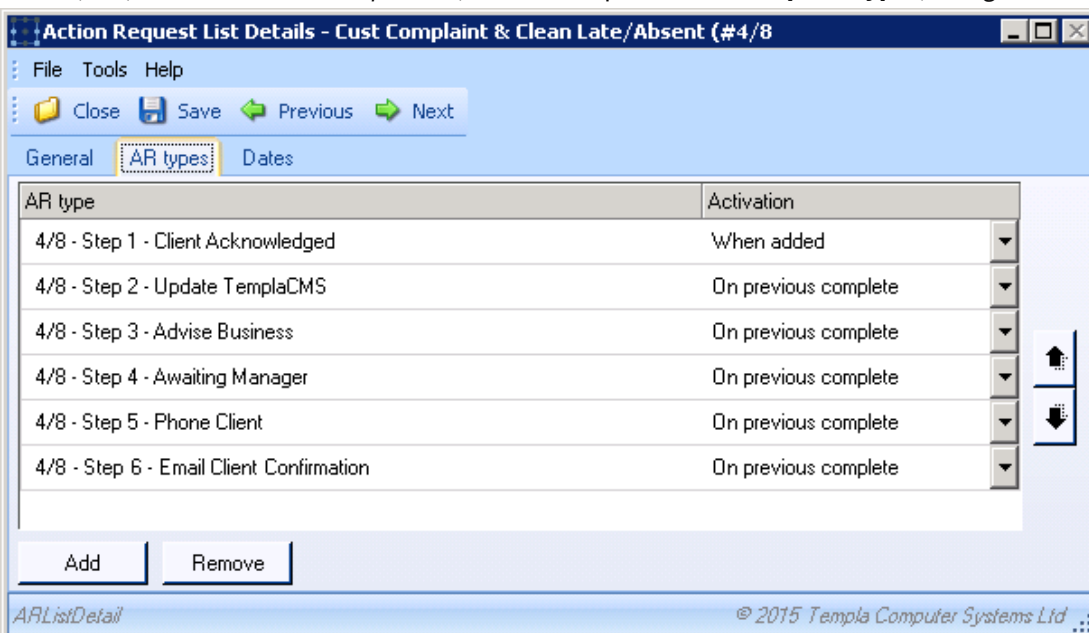
Create Service Request Type

Via **Customer Service** > **Maintenance** > **Service Requests** menu, access the **SR Types** option.

Create a **Service Request Type** – key points being as follows:

- Enter a meaningful code
- Assign the relevant **SR group**
- Assign the relevant **Initiation AR List**

Assign (if required) the relevant **Ageing**:

Older than	Text	Colour	
00:00	Ok - updated in last 10 hrs	🟩	0, 192, 0
10:00	1 x 10hr working day	🟧	255, 224, 192
20:00	2 x 10hr working days	🟧	255, 192, 128
30:00	3 x 10hr working days	🟥	255, 128, 128
40:00	4 x 10hr working days	🟥	255, 0, 0

> **NB: to ensure consistency of ageing, it maybe better to copy Service Request Types**

Update Document Templates associated MS Word document

Via **Maintenance** > **Document Management** menu, access the **Document Templates List.**

Locate the relevant **Document Template**, double click and then click on **Edit Document:**

Click on **YES** to the following message

Enter the appropriate wording and logo(s), plus include any mail merge fields using the MS Word **Mailings** > **Insert Merge** Fields ribbon option:
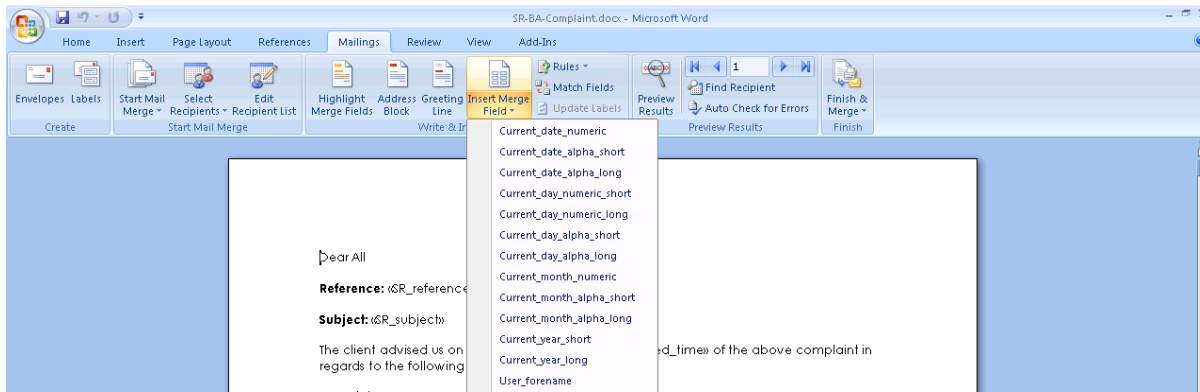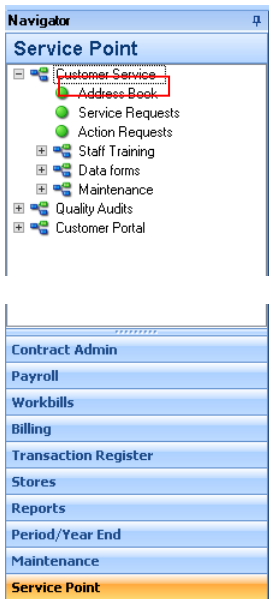

> **NB: to ensure consistency of document layout, it may be better to copy and paste a standard document layout into each document, then vary the specific wording and mail merge fields as necessary.**
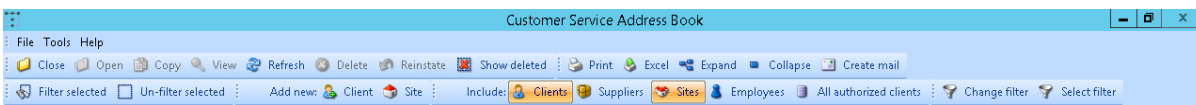
APPENDIX B – HOW TO CREATE A NEW SERVICE REQUEST

Creating a New Service Request

After logging onto CMS select the address book option from **Service point → Customer Service**:

Next select whether you would like to view clients, sites or both:

NB: highlighted buttons are selected

As with all other areas of TemplaCMS you can then search by typing in the yellow box and filter by dragging a heading to the highlighted area.
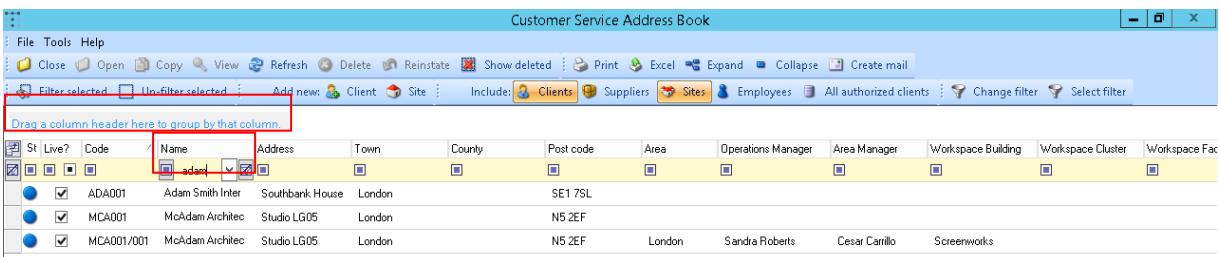
Once the desired **site/ client** has been found click on the row and ensure that the contact information is correct:
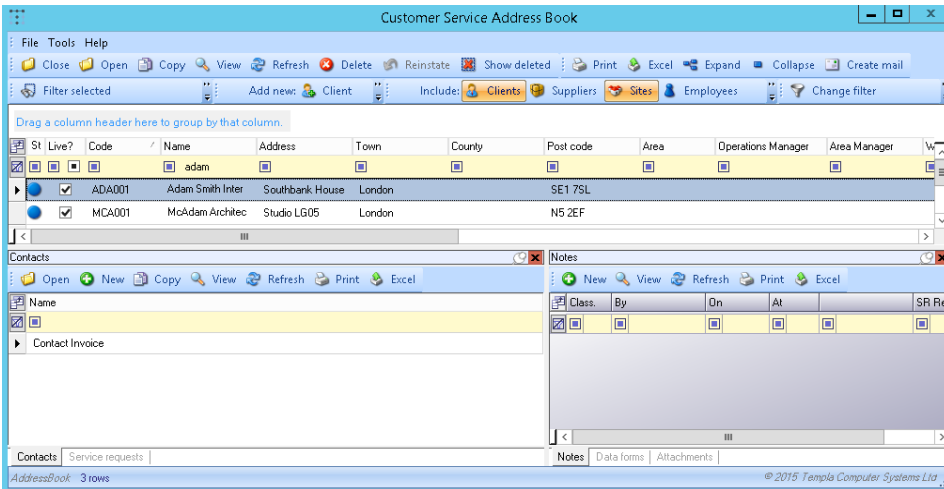
If you are happy with the list of contacts, click the service request tab at the bottom left of the screen then click on new:
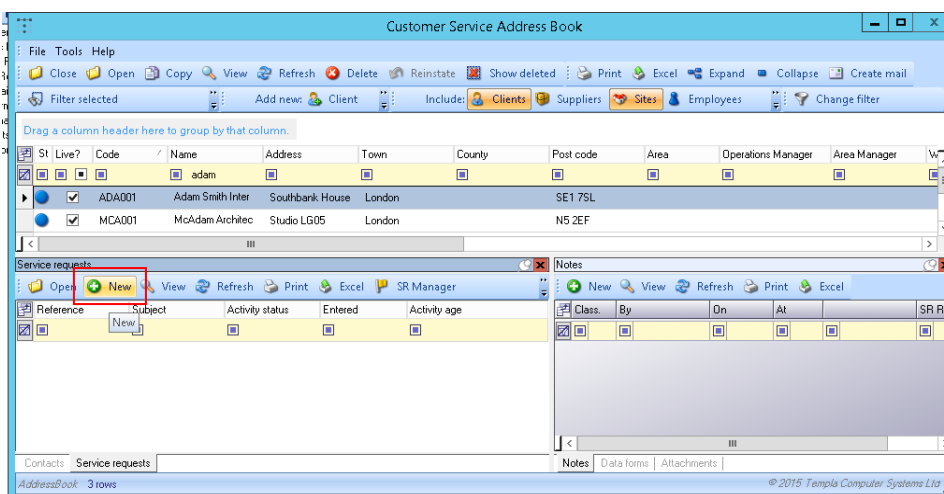
Clicking new will make the following service request detail window appear, once loaded first select a **SR type** by either manually typing a code or clicking on the binoculars.
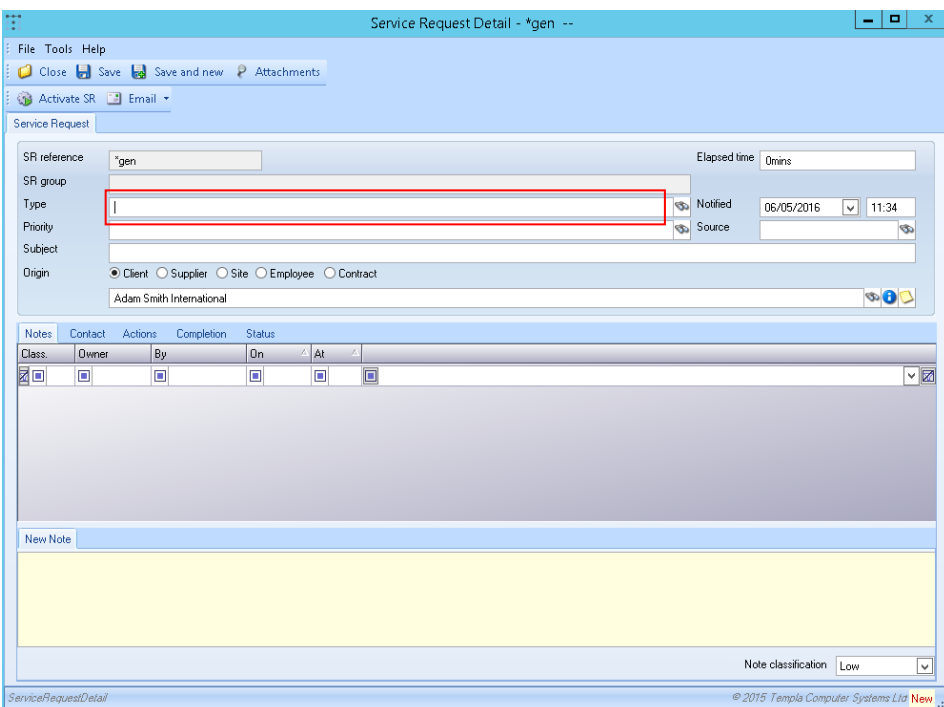
Once a type has been selected the priority and subject will be filled in automatically based on previously agreed criteria, however these can be manually changed simply by typing into the relevant box.

After the priority and subject are entered the **source** of the complaint must be selected and the **notified** date and time that it was received needs to be entered:


The source box must contain a previously agreed code, which can either be typed in or selected from a list by clicking on the binoculars. The time and date however can be set to any time the user chooses, this is so that either the time the complaint was made or the time it was logged can be recording depending on user preference.
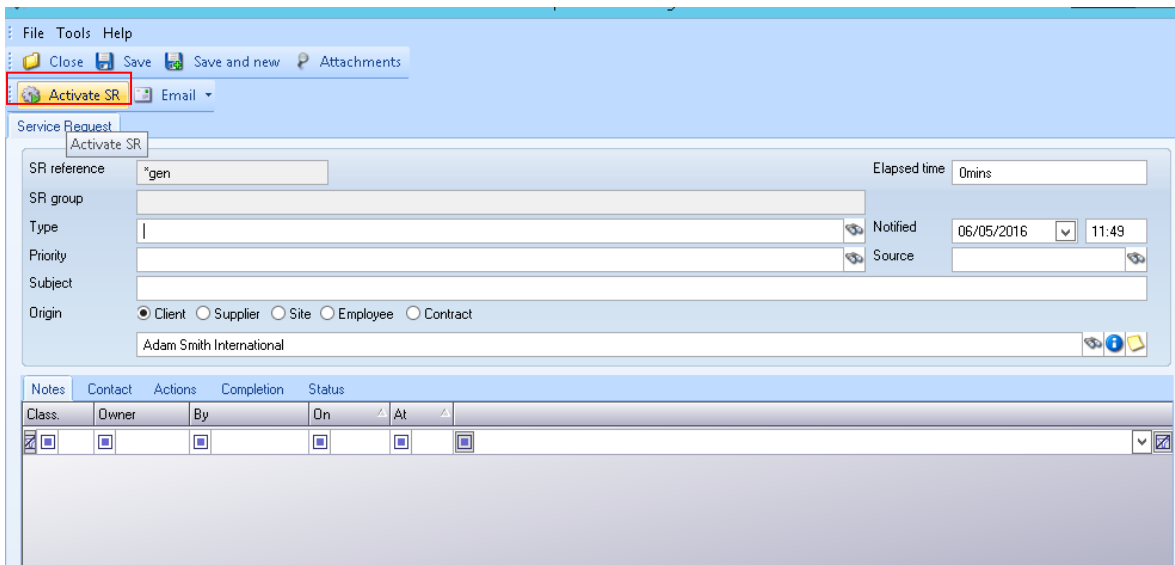
Where necessary more detailed notes can be entered at the bottom of the window, and the note classification set to change the colour of the notes tab depending on importance:
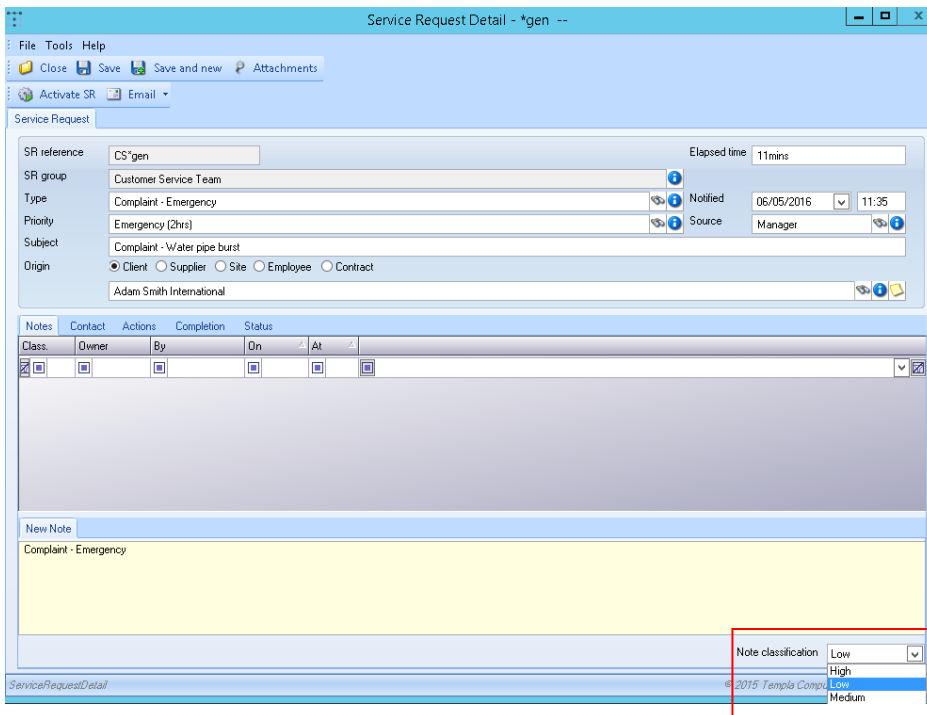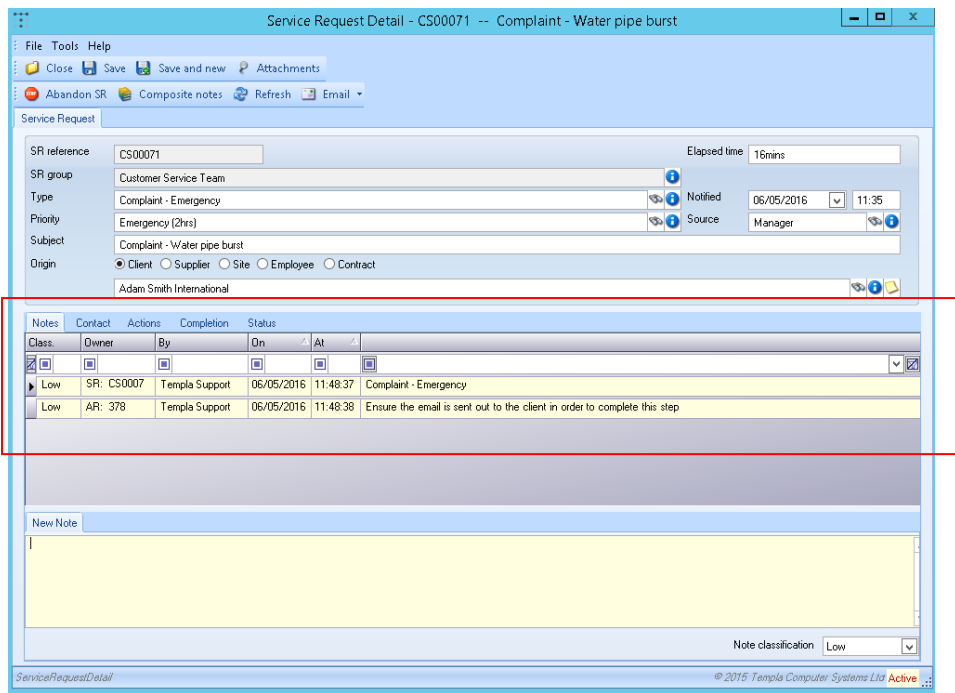

When happy with all the details on the screen click the **Activate SR** button, and click yes to the pop up box.
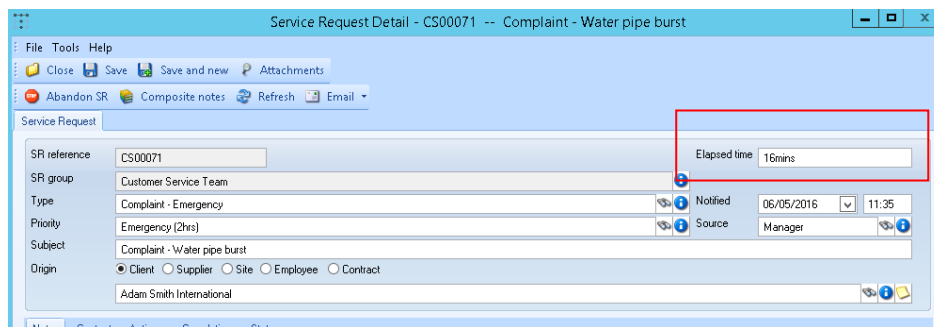

Activating an SR will have three effects.

Firstly, it will update the notes tab with the actions taken so far:

Secondly, it will begin to calculate the time that has elapsed since the SR was activated (based off of the notified date/ time set by the user):

Thirdly, it will auto create a list of actions, displaying whether they have occurred yet and their importance based on a previously agreed list:
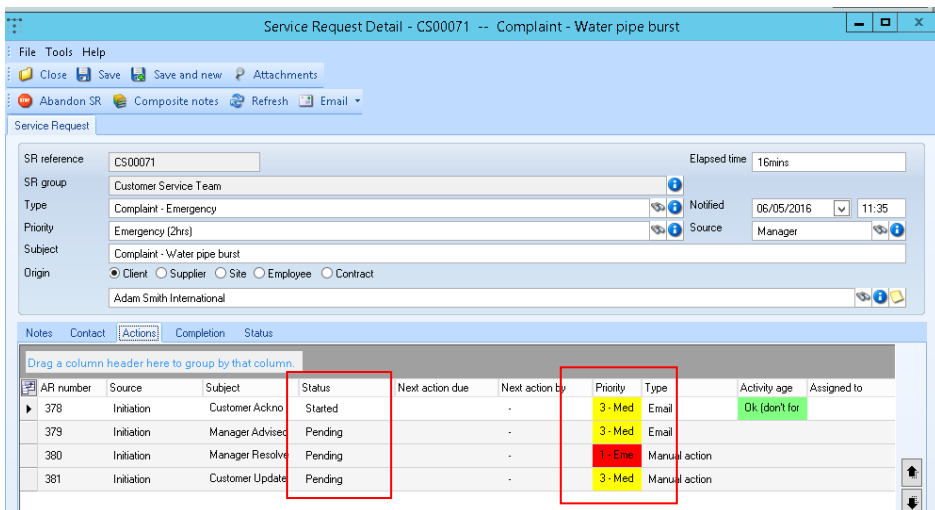

Double clicking on an action will launch a new window displaying all relevant details about the action, of most importance is the time elapsed box which will change colour depending on if the action has been taken within the specified limit:
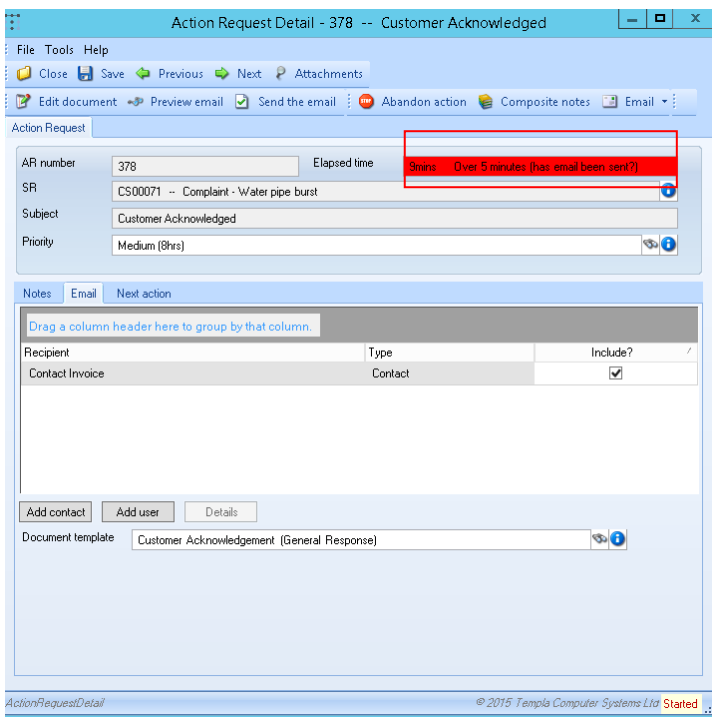
For all emailing actions the user can click the **'send the email'** button at the top of the screen to send immediately from CMS, it is also possible to add contacts via the 'add contact' button and select whether to include contacts already listed by the checkbox.
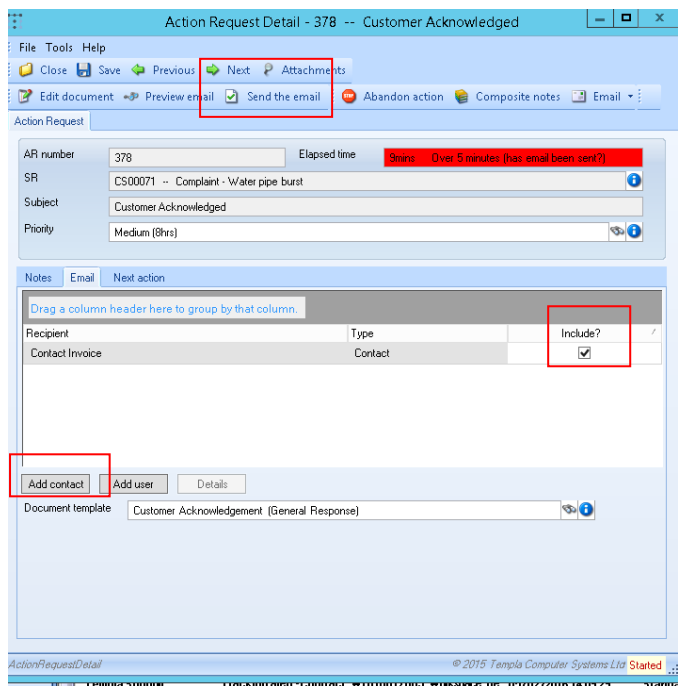

At this point built system processes such as emailing will automatically change the started status on the action list to completed and the next action on the list will be marked as started, however for none system based activities e.g. Waiting on manager resolved? The user must click on the finish and process button within the action once completed:
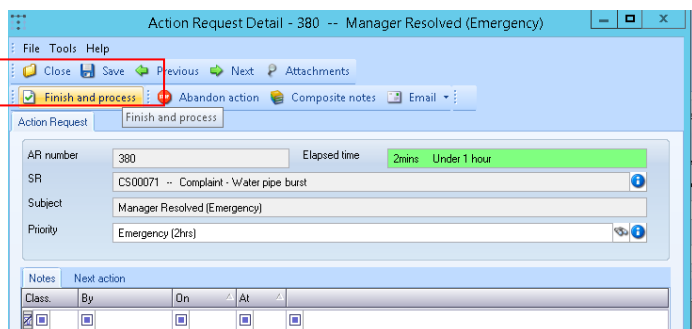
Viewing Existing Service Requests

In order to view a list of already existing Service requests click the button under **Service point** → Customer service.
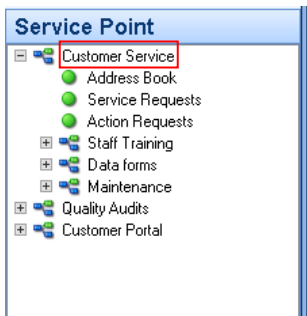
As with all other areas it is possible to change the filter by clicking the 'change filter' button at the top left, this will allow the user to choose whether to view new, completed, active etc. Click save when happy otherwise alterations will be lost.
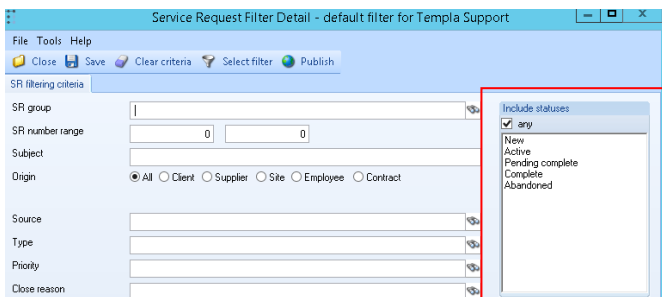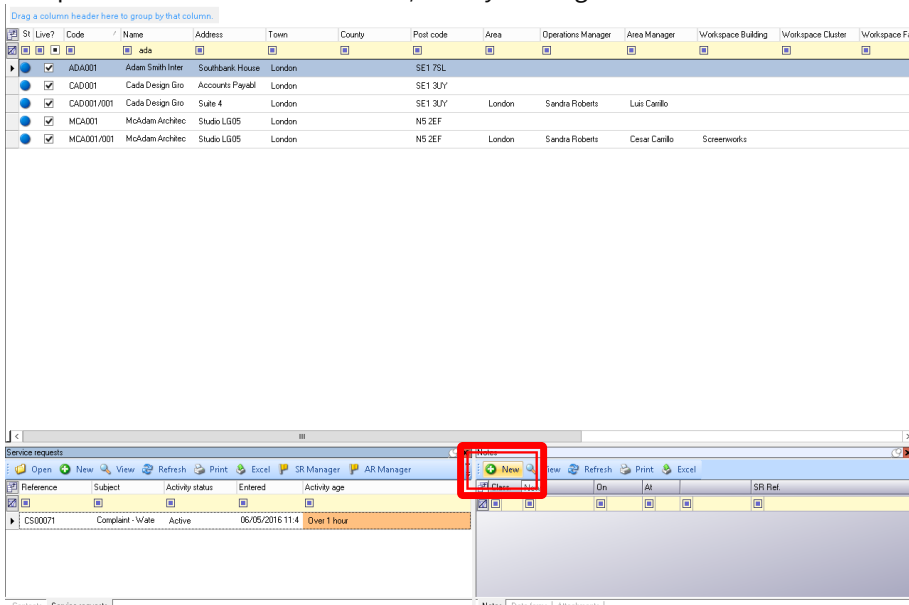

From the generated list it is possible to see all relevant details relating to an SR e.g. site, activity age, responsibility etc. Just like all other CMS grids the user can search by typing in the yellow box or filter by dragging and dropping:
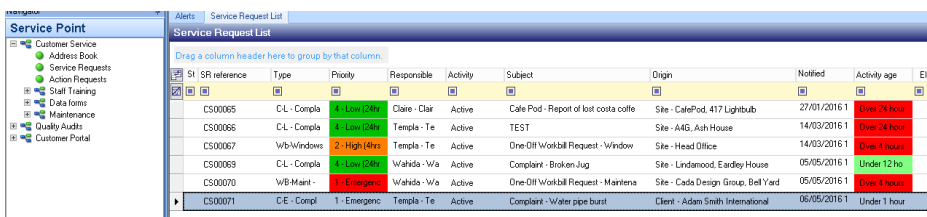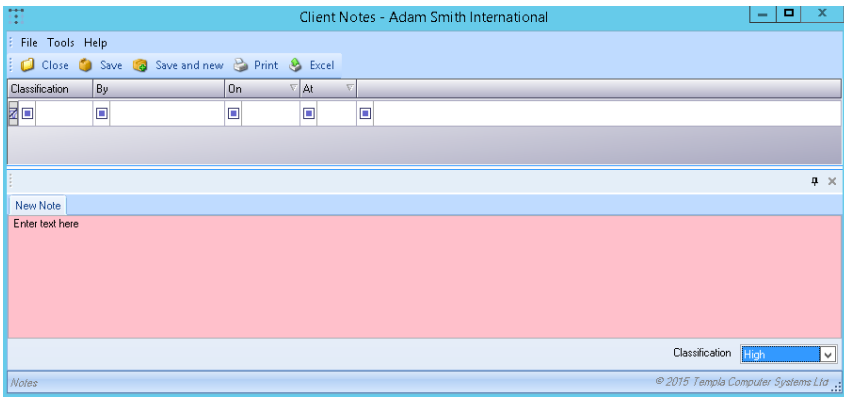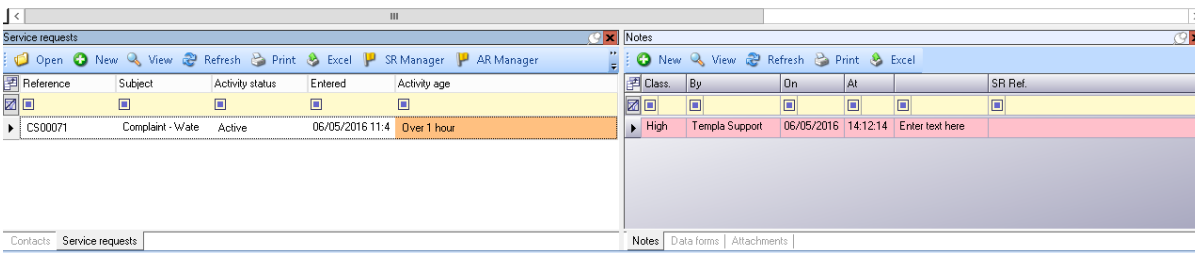

Adding Notes

Also possible to add notes to a client/ site by clicking on the new button in the lefthand window.

Then simply enter the details required, and as done before it is possible to change the classification.

Clicking save will then take the user back to the address book and a line will appear in the notes window.

GLOSSARY OF TERMS

Action request – the resultant *action request(s)* within a *service request*

Address book – allows an overview of all contact details for clients and/or sites and/or employees and/or suppliers

AR Type – controls the type of **action request**, detailing its *priority*; this is the lowest level as one or more *action requests* are combined in *AR lists* for use on a *service request*

AR List – allows the grouping of **action requests** into *AR lists* which are assigned to *SR types*

Service request – the resultant *service request* is built from the selected *SR type*

SR Group – allows the classification of *service requests* into logical groups

SR Priority – the priority of the *service request* or *action request*

SR Reasons – must be entered on all completed or abandoned *service requests*

SR Source – the source of the *service request*

SR Type – controls the type of service request, detailing the *SR group* and *SR priority* plus the initiation, and optionally closing, *AR lists*; this is really a service request template