

How to Create a Service Request Type

TEMPLACMS

Version: v.5.4.6 (September 2016)



COMMERCIAL STATEMENT

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TABLE OF CONTENTS

SUMMARY	4
Design considerations.....	5
Schematic, i.e. Design (Service Request Type) and Usage (Service Request)	5
DETAIL.....	6
Create Document Template.....	6
Create Action Request Type.....	6
Create Action Request List.....	7
Create Service Request Type	8
Update Document Template’s associated MS Word document	8
GLOSSARY OF TERMS	9

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

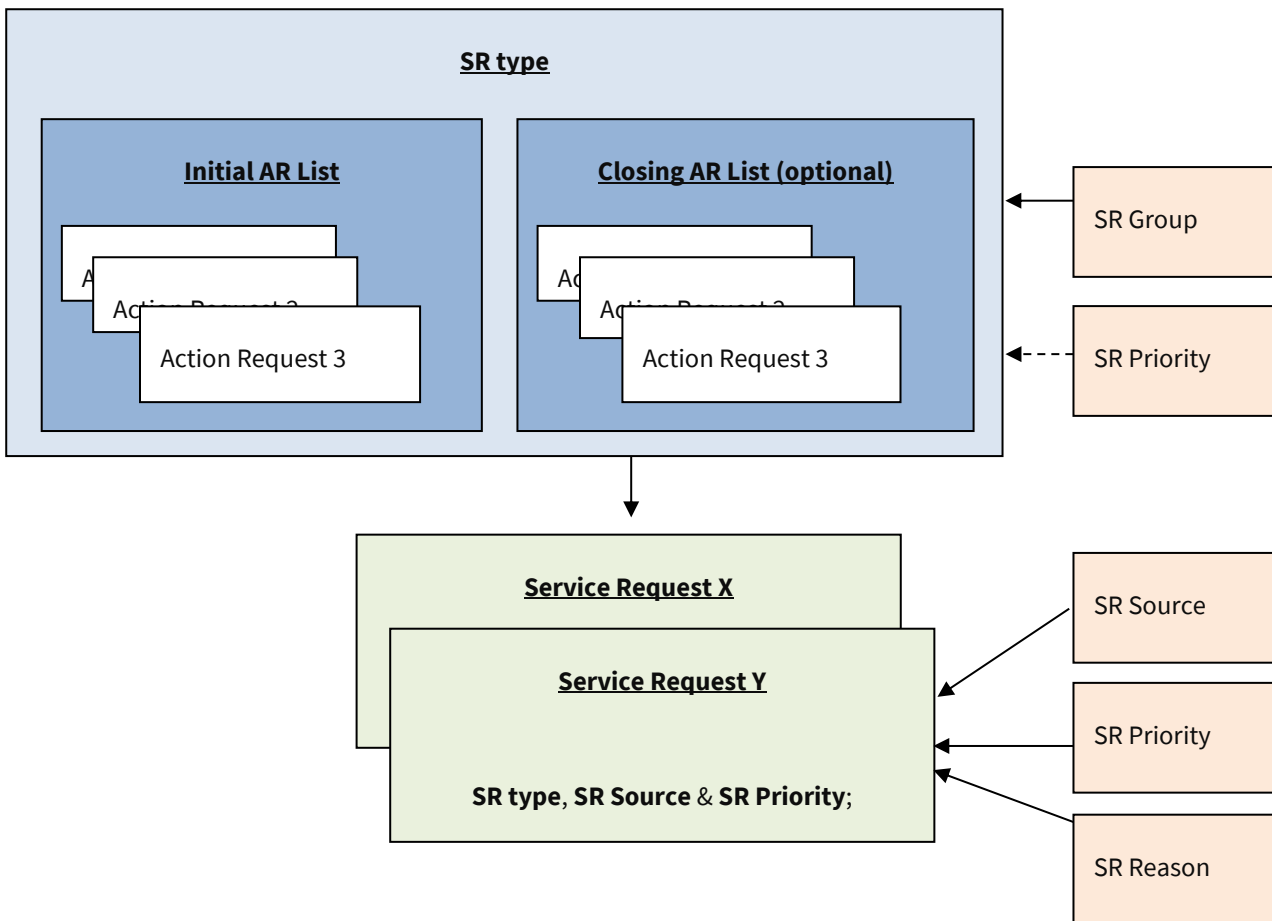
Then in **TemplaCMS** to check the **Service Request Type** has been correctly set up, create a **Service Request** (via the **Address Book** or **Service Request List**), activate it and complete all **Action Requests**, checking any resulting emailed **Document Templates**, then complete it.

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)



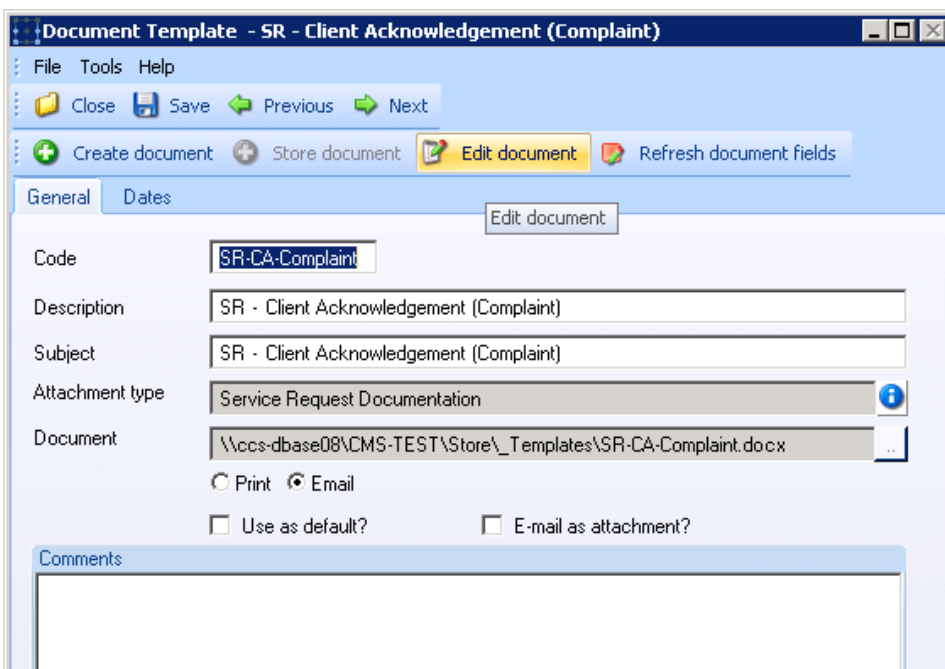
DETAIL

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

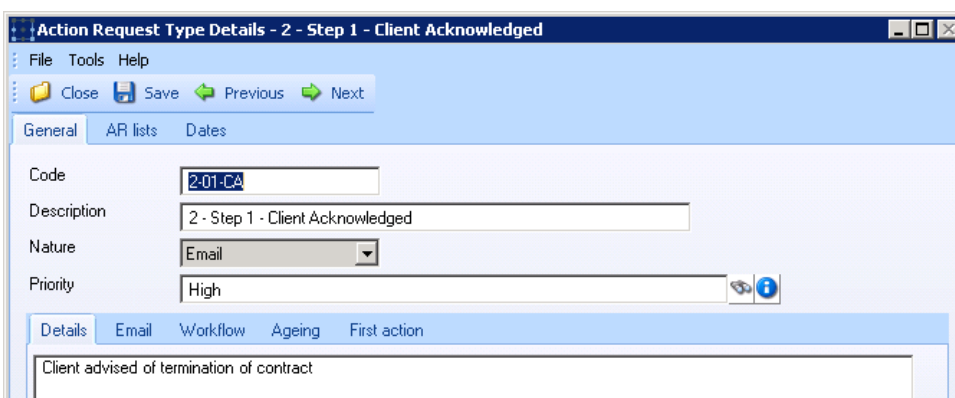


Create Action Request Type

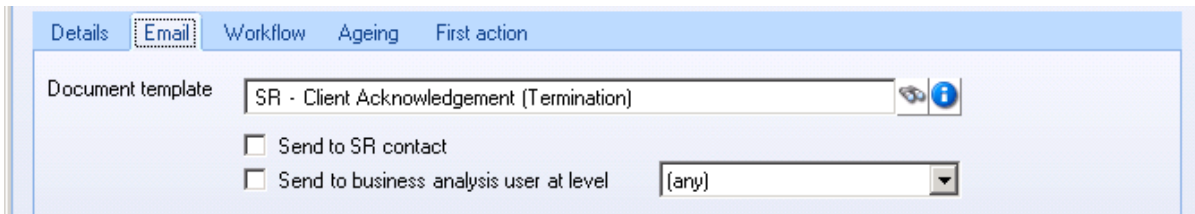
Via **Customer Service > Maintenance > Action Requests** menu, access the **AR Types** option.

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

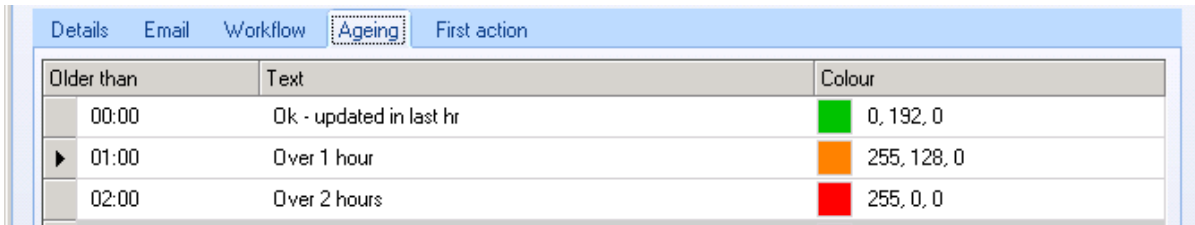
- Enter a meaningful code
- Assign the relevant **nature**, i.e. email or manual, being the most likely initially – this cannot be changed once saved



If emailing or printing, assign the **Document Template**:



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



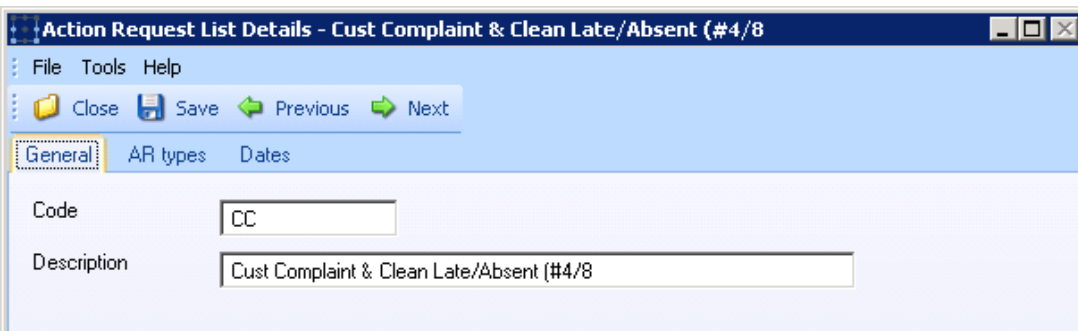
Older than	Text	Colour
00:00	Ok - updated in last hr	0, 192, 0
01:00	Over 1 hour	255, 128, 0
02:00	Over 2 hours	255, 0, 0

NB: to ensure consistency of ageing, it may be better to copy Action Request Types

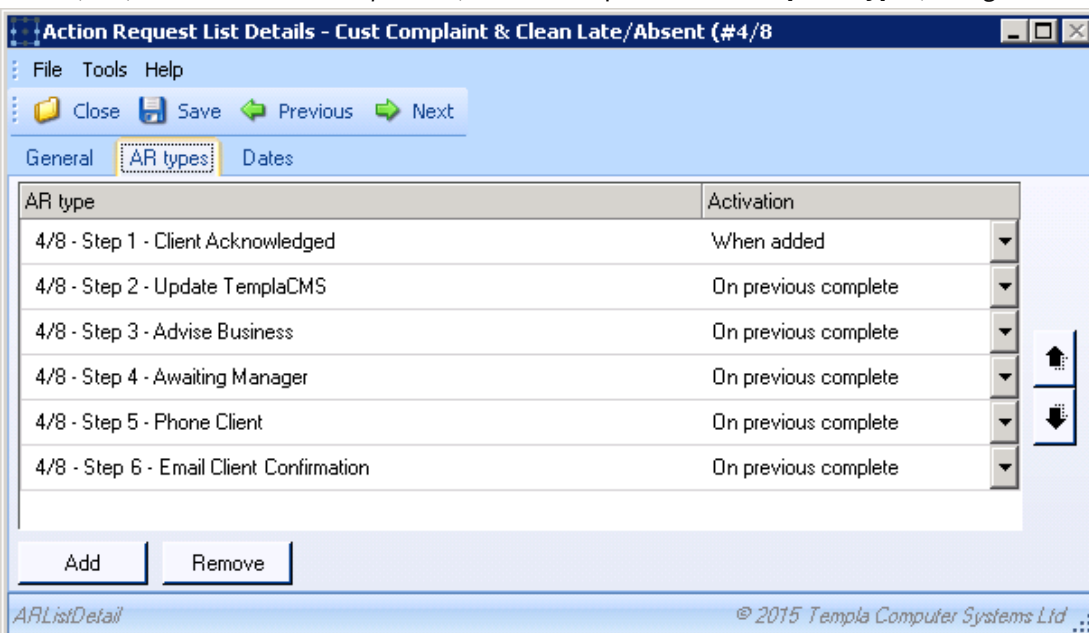
Create Action Request List

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:



AR type	Activation
4/8 - Step 1 - Client Acknowledged	When added
4/8 - Step 2 - Update TemplaCMS	On previous complete
4/8 - Step 3 - Advise Business	On previous complete
4/8 - Step 4 - Awaiting Manager	On previous complete
4/8 - Step 5 - Phone Client	On previous complete
4/8 - Step 6 - Email Client Confirmation	On previous complete

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**

SR Type - Complaint - Cleaner/Operative Late or Absent (#8)

File Tools Help

Close Save Previous Next

General Ageing Dates

Code: CO

Description: Complaint - Cleaner/Operative Late or Absent (#8)

SR group: Customer Help Desk

Priority: High

Initiation AR list: Cust Complaint & Clean Late/Absent (#4/8)

Closure AR list:

Force closure notes?

Enable on customer portal?

Enabled on mobile?

SRTypeDetail © 2015 Templa Computer Systems Ltd

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 Template's 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

Microsoft Office Word

Opening this document will run the following SQL command:

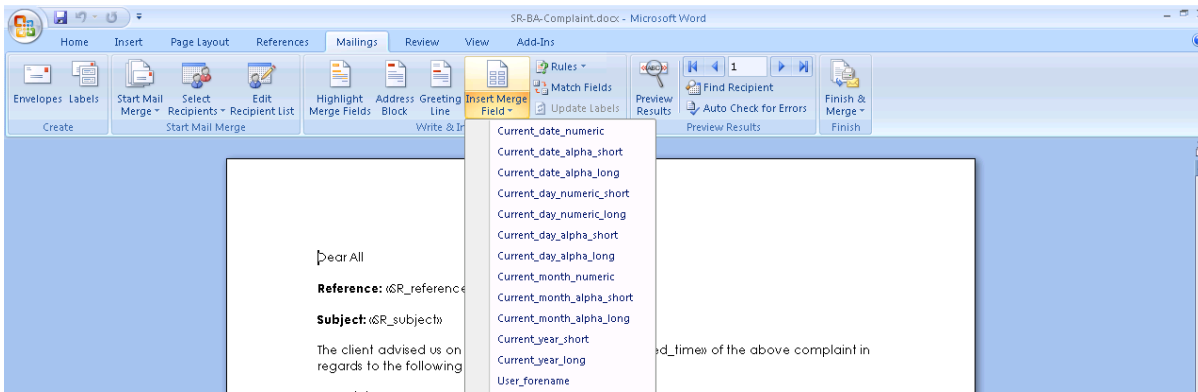
```
SELECT * FROM \\ccs-dbase08\CMS-TEST\Store\_Templates\_Datasources\SR-BA-Complaint.csv
```

Data from your database will be placed in the document. Do you want to continue?

Show Help >>

Yes No

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 maybe better to copy and paste a standard document layout into each document, then vary the specific wording and mail merge fields as necessary.

GLOSSARY OF TERMS

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

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

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 (or SR) – 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



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