

How to create a new Service Request TEMPLACMS

Version: v.5.4.6 (May 2016)



COMMERCIAL STATEMENT

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SUMMARY

A service request can be generated through the address book for either a client or site and can be either a workbill or complaint, once generated the service request will automatically provide the user with a list of pre-set actions that must be taken along with a time frame for completion.

DETAIL

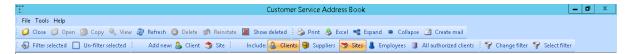
Creating a new Service request

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

Navigator	д
Service Point	
Customer Service Address Book Service Requests Address Book Service Requests Staff Training Staff Training Address Book Maintenance Gualdruk Audits Customer Portal	
Contract Admin	
Contract Admin	
Contract Admin Payroll	
Contract Admin Payroll Workbills	
Contract Admin Payroll Workbills Billing	
Contract Admin Payroll Workbills Billing Transaction Register	
Contract Admin Payroll Workbills Billing Transaction Register Stores	
Contract Admin Payroll Workbills Billing Transaction Register Stores Reports	

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.

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: File	Tool	ls Help											
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			to group by that co	lumn.									
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		ADA001								-	1		

Once the desired **site/ client** has been found click on the row and ensure that the contact information is correct:

- EE	Customer	Service Address	Book		_	• • ×
: File Tools Help						
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😽 Filter selected 🚆	Add new: 💩 Client 🚆 👘 Inclu	ude: 🔒 Clients 🤪	Suppliers 🤭 S	ites 💄 Employees	🚆 💡 Change filter	
Drag a column header here to group by that c	olumn.					
I St Live? Code / Name	Address Town	County	Post code	Area Oper	ations Manager Area Man	ager W
🛛 🔳 🔳 🔳 adam						
ADA001 Adam Smith Inter	Southbank House London		SE1 7SL			
MCA001 McAdam Architec	Studio LG05 London		N5 2EF			~
						>
Contacts		<u>9 ×</u>	Notes			<u>9</u> ×
🕴 🥥 Open 😋 New 🛅 Copy 🔍 View 🤅	🍣 Refresh 🍛 Print 🤌 Excel		🖸 🕄 New 🔍	View 🎅 Refresh	🍛 Print 🤌 Excel	
P Name			🚰 Class. By	On	At	SR Ref
Contact Invoice						
			<	ш		>
Contacts Service requests			Notes Data form	ns Attachments		
AddressBook 3 rows					© 2015 Templa Compute	er Systems Ltd 🔡

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:

						Cu	stomer Servi	ce Address	Book				- 1	□ ×
1	Fil	e Tools	Help											
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	Servio	ce reque	ats	3				<u> S</u> ×	Notes					Ø×
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			New											
									<		Ш			>
	Con	tacts S	ervice reques	its					Notes	Data forms Atta	chments			
	Addre	ess8ook	3 rows									@ 2015 Tel	mpla Computer Sy	stems Ltd

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.

			Service Re	quest Detai	l - *gen				-	. 🗖	x
E File Tools Help											
🕴 💋 Close 🛃 Sa	ive 😸 Save and new 🕴	P Attachments									
🕴 🎲 Activate SR 🛛	📑 Email 🔹										
Service Request											
SR reference	*gen						Elapsed time	Omine			
File Tools Help Close ■ Save ■ Save and new P Attachments Service Request Service Request SR reference											
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Priority						Ø	Source				s,
Subject											
Origin	● Client ○ Supplier ○ Si	te OEmployee OCo	tract								
	Adam Smith International								9	60	2
Notes Contact	Actions Completion	Status									
Class. Owner		On 🛆 At	2						_		
											 Z
New Note											
											-
							No	te classification	Low		~
ServiceRequestDetail							© 201	15 Templa Comp	uter Sysi	ems Ll	Ø New

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.

	Service Request Detail - *gen				_ 🗆 X
File Tools Hel)				
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🚳 Activate SR	🛄 Email 💌				
Service Request					
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SR reference	CS*gen		Elapsed time	Omins	
SR group	Customer Service Team	0			
Туре	Complaint - Emergency		Notified	06/05/2016	✓ 11:35
Priority	Emergency (2hrs)	Ø 🖯	Source		Ø,
Subject	Complaint - Water pipe burst				
Origin	Client O Supplier O Site O Employee O Contract				
	Adam Smith International				🗸 🔁 🛷

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:

	Service Request Detail - *gen			- • ×
i File Tools Help				
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Service Request				
		FI 11		
SR reference	CS*gen	Elapsed time	Omins	
SR group	Customer Service Team			
Туре	Complaint - Emergency	Notified	06/05/2016	✓ 11:35
Priority	Emergency (2hrs)	Source		90
Subject	Complaint - Water pipe burst			
Origin	Client O Supplier O Site O Employee O Contract			
	Adam Smith International			2 6 20
Notes Contact	Actions Completion Status			

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.

		Service Request Sources 💻 🗖	x							
F	ile Tools H	Help								
(길 Close 📓] Select 🎯 Refresh	++ ∓							
D	Drag a column header here to group by that column.									
7	Code	Description								
1										
۲	E	Email								
	м	Manager								
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	W	Website								
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SR	SourceSelect	4 rows © 2015 Templa Computer Systems i	Ltd							

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:

	Service Request Detail - *gen			– – X
File Tools Help				
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🚳 Activate SR	🗈 Email 🝷			
Service Request				
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SR group	Customer Service Team		11111110	
Туре		Notified	06/05/2016	▼ 11:35
Priority	Emergency (2hrs)	Source	Manager	<u>⊚</u>
Subject	Complaint - Water pipe burst			
Origin	Client O Supplier O Site O Employee O Contract			
	Adam Smith International			Ø 🔁 💋
Notes Contact	Actions Completion Status			
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Complaint - Emerg	ncy			
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ServiceRequestDetai		© 201	5 Templa Compu	High
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When happy with all the details on the screen click the **Activate SR** button, and click yes to the pop up box.

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SR group				
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Priority	\$	Source		\$
Subject				
Origin Olient O Supplier O Site O Employee O Contract				
Adam Smith International				200
Notes Contact Actions Completion Status				
Class. Owner By On (At (
				✓ Ø

Activating an SR will have three effects.

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

		Service Reques	t Detail - CS00071 -	- Complaint	- Water pipe burst			_ □	x
File Tools Help									
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😐 Abandon SR	🍃 Composite notes 🧃	🖗 Refresh 🔡 Email	•						
Service Request									
SR reference						Elapsed time	[
SR group	CS00071					Elapsed time	16mins		
	Customer Service Team				0	M. Co. J	06/05/2016		
Type Priority	Complaint - Emergency		6 @ 6 @					✓ 11:35	
Subject	Emergency (2hrs)				Ø 🚺	Source	Manager	∞ 0	
	Complaint · Water pipe burs Client O Supplier O S								
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Notes Contact	Actions Completion	Status							
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Low SR: C	S0007 Templa Support	06/05/2016 11:48:37	Complaint · Emergency						
Low AR: 3	78 Templa Support	06/05/2016 11:48:38	Ensure the email is sent o	ut to the client in c	rder to complete this step				
									-
New Note									
1									
						No	te classification	Low	~
erviceReguestDetail						@ 2015	i Templa Compu	ler Systems Ltd <mark>Ac</mark>	tive .

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):

	Service Request Detail - CS00071 Complaint - Water pipe bur	st		- 🗆 ×
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😑 Abandon SR	😝 Composite notes 🛯 Refresh 🔝 Email 🔹			
Service Request				
SR reference	C\$00071	Elapsed time	16mins	
SR group	Customer Service Team	•		
Туре	Complaint - Emergency	Notified	06/05/2016	/ 11:35
Priority	Emergency (2hrs)	Source	Manager	
Subject	Complaint - Water pipe burst			
Origin	● Client O Supplier O Site O Employee O Contract			
	Adam Smith International			Ø 🕄 💋
Notes Contact	Actionse Complation Statue			

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

			Serv	ice Request D	etail - CS00071 -	- Complaint - '	Water pipe	e burst			L-	. 🗆
ile	Tools Help)										
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SR	reference	CS00071							Elapsed time	e 16mins		
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Тур	pe	Complaint - Em	nergency					B	Notified	06/05/201	6 🗸	11:35
Pric	ority	Emergency (2h	nrs)					∞ (1	Source	Manager	9	
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Orig	gin	Client O St Adam Smith In	upplier OSite OEmpl	oyee 🔿 Contract	1						4	5 🛈 🖊
Orig No	gin otes Contac	Client O St Adam Smith In Actions (upplier OSite OEmpl ternational								9	5 🔁 🔽
Orig No Dr	gin otes Contac	Client O St Adam Smith In Actions (upplier O Site O Empl ternational Completion Status		Next action due	Next action by	Priority	Туре		Activity age	Assigned to	
Oriç No Dr	gin otes Contac rag a column	Client Ost Adam Smith In t Actions (header here to	upplier O Site O Empl ternational Completion Status 9 group by that column		_	Next action by	Priority 3 - Med	Type Email		Activity age Ok (don't for		
Oriç No Dr	gin otes Contac rag a column AR number	Client Osc Adam Smith In Actions C Adam Smith In Actions C Actions C Source C C C C C C C C C C C C C C C C C C C	upplier O Site O Empl ternational Completion Status s group by that column Subject	Status	_							
Orig No Dr	gin otes Contac rag a column AR number 378	Client St. Adam Smith In Actions Client St. Adam Smith In Actions Client St. Actions Client St. Actions	upplier Site Empl ternational Completion Status a group by that column Subject Customer Ackno	Status Stated	_	· ·	3 - Med	Email				

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:

	ŧ	Action Request Det	ail - 378	Customer Ackn	owledged	_ 🗆 ×
	File Tools Help					
	🥥 Close 🛃 Sa	ive 🗢 Previous 🔿 Next 👂 A	ttachments			
	📝 Edit documen	it 🛷 Preview email 🛃 Send the	e email 🕴 😐	Abandon action	🔒 Composite notes	🔚 Email 🔹
4	Action Request					
	AB number	378	Elapsed time	9mins Over	5 minutes (has email be	
	SR	CS00071 Complaint - Water pipe b		onins over	o minutes (nas emai de	
	Subject	Customer Acknowledged	anat			
	Priority	Medium (8hrs)				⊕ (€)
		meulum (onis)				
	Notes Email	Next action				
			-			
		header here to group by that colum				
	Recipient Contact Invoice		Ту	oe ontact		Include? /
	Add contact	Add user Details				
	Document template	e Customer Acknowledgement (Ger	neral Response)			© <mark>()</mark>
A	stionReguestDetail			6	2015 Templa Compute	er Systems Ltd Started

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.

	Action Request Detail - 378 Customer Acknowledged	
File Tools Help	·	
- u	Save 💠 Previous 🌳 Next 👂 Attachments	
-	nent 🛷 Preview email 🕑 Send the email 😄 Abandon action 🧯 Composite notes 🔝 Ema	il ★ :
Action Request		
AR number	378 Elapsed time 9mins Over 5 minutes (has email been sent?)	
SR	CS00071 Complaint - Water pipe burst	0
Subject	Customer Acknowledged	
Priority	Medium (Bhrs)	5 🚹
Notes Email	Next action	
Drag a column Recipient	nn header here to group by that column. Type Include?	
Contact Invoice		
	-	
Add contact	Add user Details	
Document templat	late Customer Acknowledgement (General Response)	
ActionRequestDetail	sil © 2015 Templa Computer Systems L	Id Started
THE LEW	2000 TTACKING ALCONTACT WOTOUT7003 WORKSPACE, DE 03/02/2010 14.03.23	ətanu

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:

E	İ	Action Request Detail - 380 Manager Resolved (Emergency)	_ D X										
8	i File Tools Help												
1	🔋 💋 Close 📙 Save 🗇 Previous 🛸 Next 👂 Attachments												
:	🕑 Finish and process 🛙 🕼 Abandon action 👔 Composite notes 🔝 Email 👻												
A	Action Request	Finish and process											
	AB number	200 Elapsed time 2mine Under 1 hour											
	An number	380 Elapsed time 2mins Under 1 hour											
	SR	CS00071 Complaint - Water pipe burst	0										
	Subject	Manager Resolved (Emergency)											
	Priority	Emergency (2hrs)	∞ 🚹										
	Notes Next ac	tion											
	Class. By	On 🛆 At 🛆											

Viewing existing Service requests

In order to view a list of already existing Service requests click the button under **Service point** \rightarrow 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.

:	Service Request Filter Detail - default filter for Templa Support	_ D X
File Tools Help		
🥥 Close 🛃 Save 🥥	🛿 Clear criteria 🛛 💡 Select filter 🕥 Publish	
SR filtering criteria		
SR group	I Include	statuses
SR number range	0 0 New	
Subject	Active	complete
Origin	All O Client O Supplier O Site O Employee O Contract Complet Abando	le i
Source	<i>©</i>	
Туре	Ø	
Priority	Ø	
Close reason	0	

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:

wanyaw	Aler	ts Service Requ	est List								x			
Service Point	Ser	vice Request I	ist											
Customer Service Address Book	Dra	Drag a column header here to group by that column.												
Service Requests Action Requests	(王)	St SR reference	Туре	Priority	Responsible	Activity	Subject	Origin	Notified	Activity age	Elap			
🗷 📲 Staff Training														
🗷 🔫 Data forms 🗷 🔩 Maintenance		CS00065	C-L - Compla	4 - Low (24hr	Claire - Clair	Active	Cale Pod - Report of lost costa coffe	Site - CafePod, 417 Lightbulb	27/01/2016 1	Over 24 hour				
🗉 📲 Quality Audits		CS00066	C-L · Compla	4 - Low (24hr	Templa - Te	Active	TEST	Site - A4G, Ash House	14/03/2016 1	Over 24 hour				
🗉 📲 Customer Portal		CS00067	Wb-Windows	2 · High (4hrs	Templa - Te	Active	One-Off Workbill Request - Window	Site - Head Office	14/03/2016 1	Over 4 hours				
		CS00069	C-L - Compla	4 - Low (24hr	Wahida · Wa	Active	Complaint - Broken Jug	Site - Lindamood, Eardley House	05/05/2016 1	Under 12 ho				
		CS00070	WB-Maint -	1 - Emergenc	Wahida - Wa	Active	One-Off Workbill Request - Maintena	Site - Cada Design Group, Bell Yard	05/05/2016 1	Over 4 hours				
	Þ	CS00071	C-E - Compl	1 · Emergenc	Templa - Te	Active	Complaint - Water pipe burst	Client - Adam Smith International	06/05/2016 1	Under 1 hour				

Adding notes

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

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	Live?		Name ada	Address	Town	County	Post code	Area	Operations Manager	Area Manager	Workspace Building	Workspace Cluster	Workspace
			_							•			
	✓	ADA001	Adam Smith Inter	Southbank House			SE1 7SL						
•	~	CAD001	Cada Design Gro		London		SE1 3UY						
•	✓	CAD001/001	Cada Design Gro	Suite 4	London		SE1 3UY	London	Sandra Roberts	Luis Carrillo			
•	~	MCA001	McAdam Architec		London		N5 2EF						
	✓	MCA001/001	McAdam Architec	Studio LG05	London		N5 2EF	London	Sandra Roberts	Cesar Carrilo	Screenworks		
	requests				ш			Mater					0
ervice n	requests Open (View 🎯 Refresh	🍪 Print 🔌 Exc		er 🥊 AR Manage	C P	Notes	iew 🎅 Refresh	🍰 Print 🔌 Exc	el		G
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Then simply enter the details required, and as done before it is possible to change the classification.

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New Note														
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Notes										© 20	15 Templa (Computer S	iystems L	la

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

<				ш								>
Service requests						Notes						<u>9</u> ×
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Reference	Subject	Activity status	Entered	Activity age		🚰 Class.	By	On	At		SR Ref.	
CS00071	Complaint - Wate	Active	06/05/2016 11:4	0 ver 1 hour		High	Templa Support	06/05/2016	14:12:14	Enter text here		
Contacts Service rec	quests					Notes D	ata forms Attachme	nts				



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.