

How to create a new Service Request

TEMPLACMS

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COMMERCIAL STATEMENT

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TABLE OF CONTENTS

SUMMARY	4
DETAIL.....	4
Creating a new Service request	4
Viewing existing Service requests.....	11
Adding notes.....	11

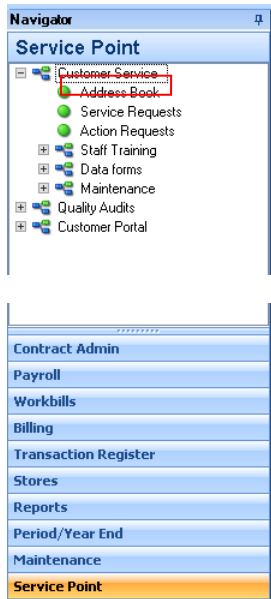
SUMMARY

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

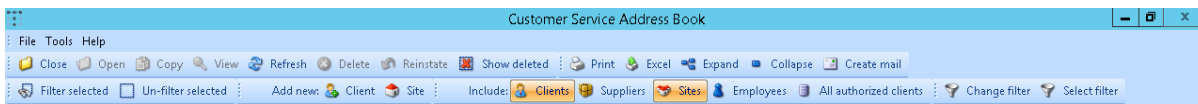
Creating a new Service request

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

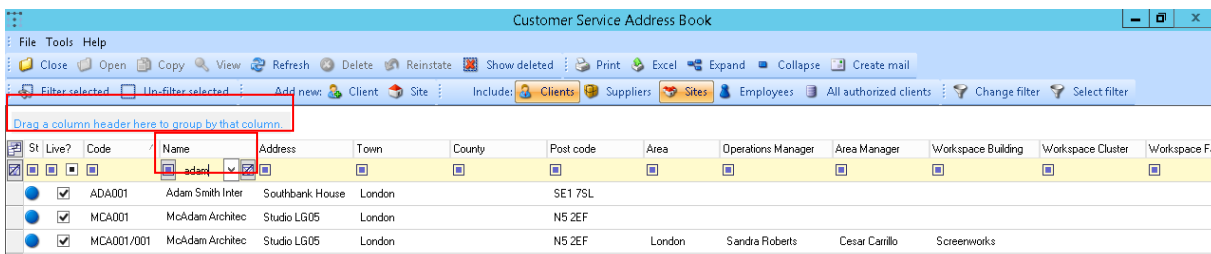


Next select whether you would like to view clients, sites or both:

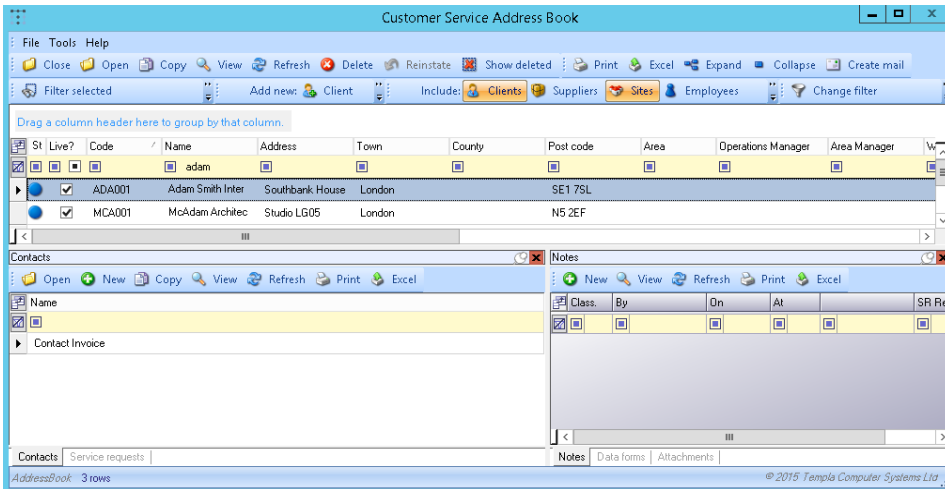
NB: highlighted buttons are selected



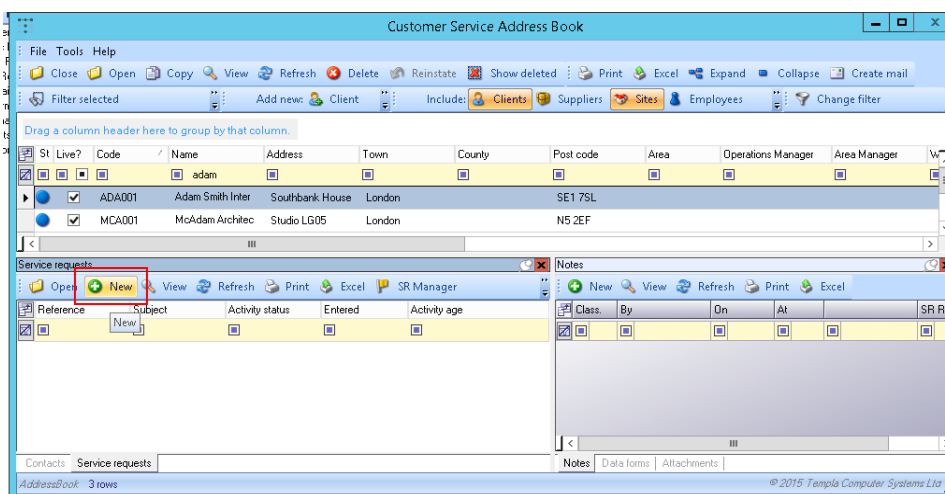
As with all other areas of TemplaCMS you can then search by typing in the yellow box and filter by dragging a heading to the highlighted area.



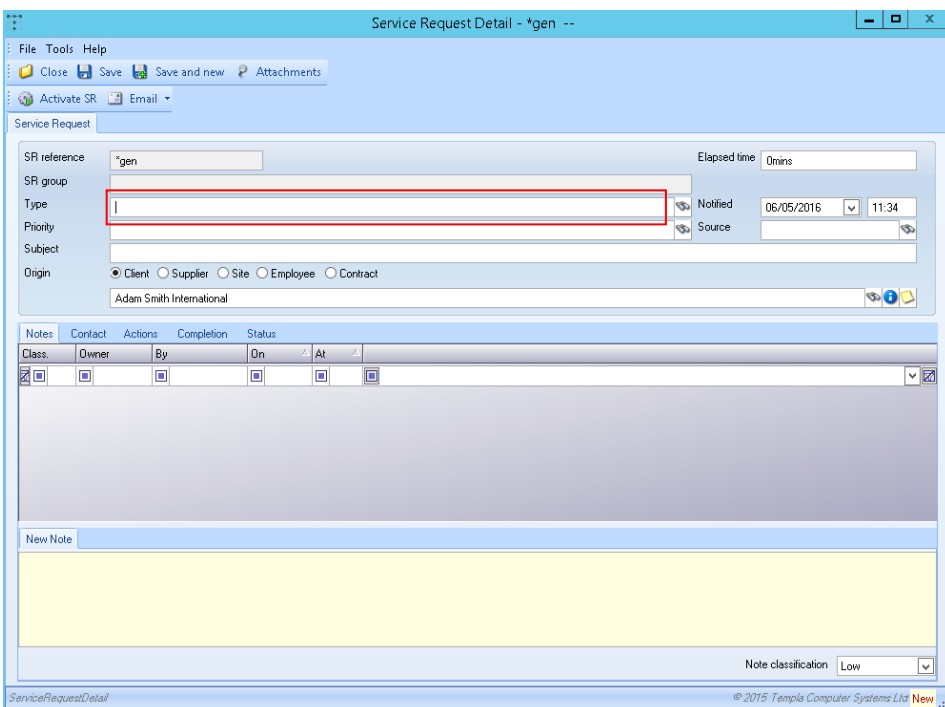
Once the desired **site/ client** has been found click on the row and ensure that the contact information is correct:



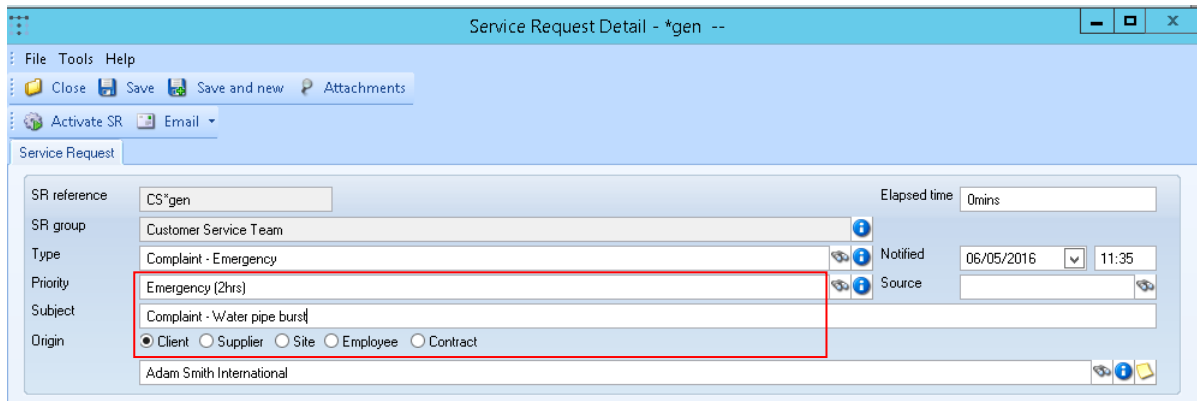
If you are happy with the list of contacts, click the service request tab at the bottom left of the screen then click on new:



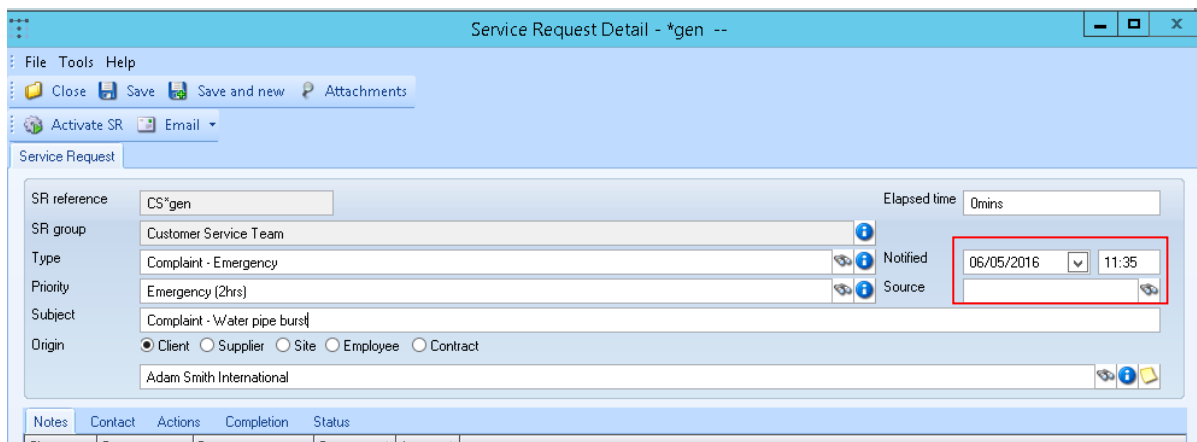
Clicking new will make the following service request detail window appear, once loaded first select a **SR type** by either manually typing a code or clicking on the binoculars.



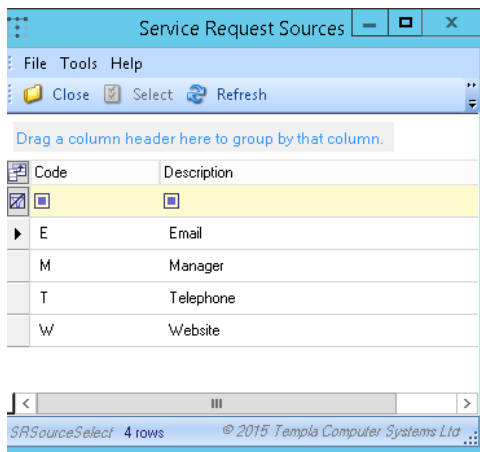
Once a type has been selected the priority and subject will be filled in automatically based on previously agreed criteria, however these can be manually changed simply by typing into the relevant box.



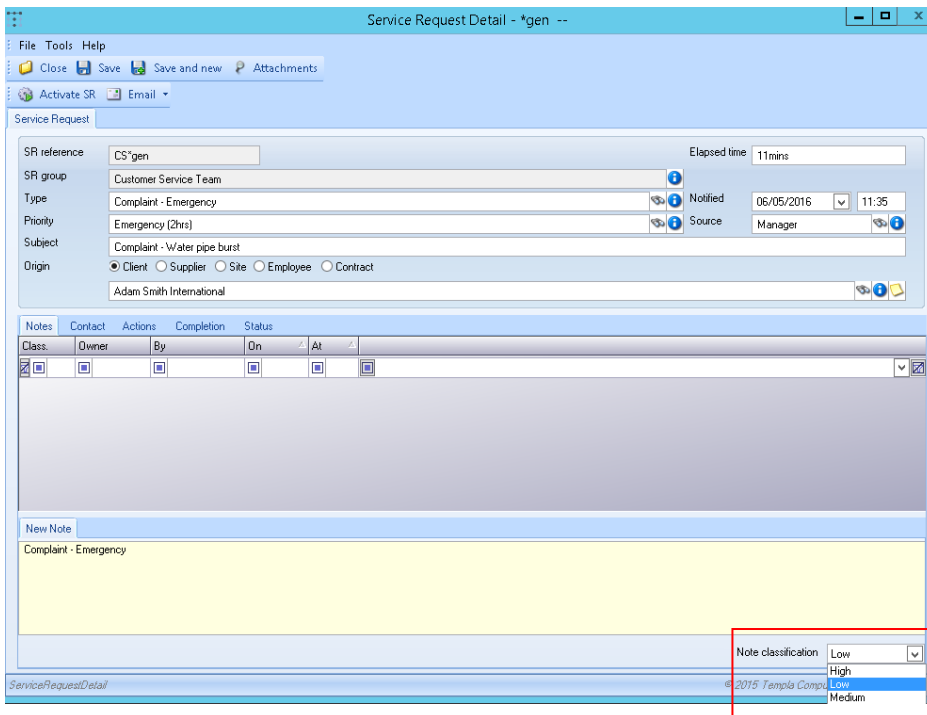
After the priority and subject are entered the **source** of the complaint must be selected and the **notified** date and time that it was received needs to be entered:



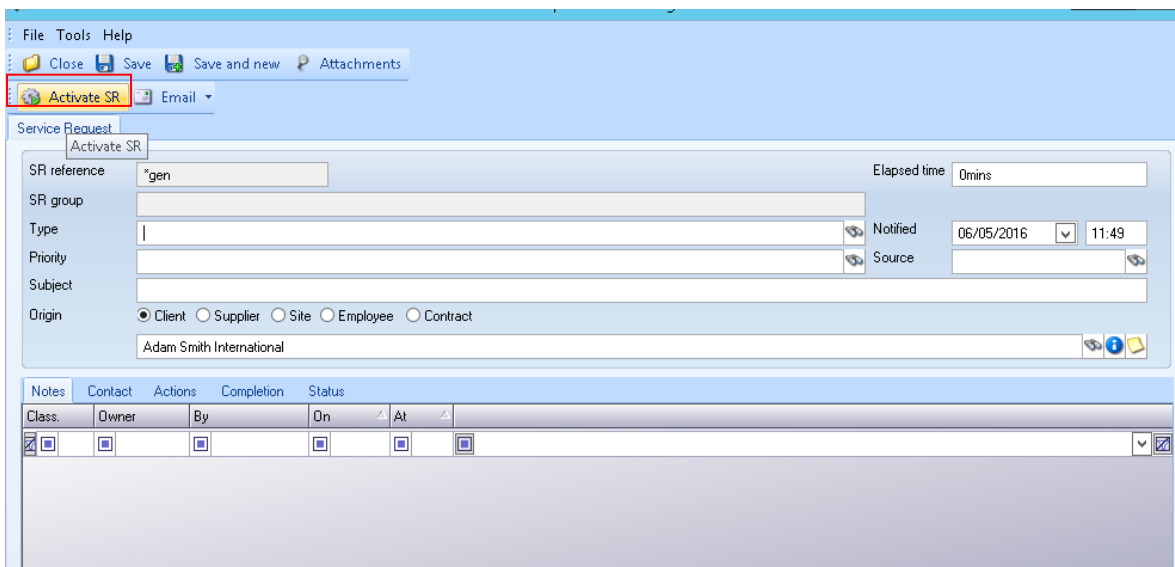
The source box must contain a previously agreed code, which can either be typed in or selected from a list by clicking on the binoculars. The time and date however can be set to any time the user chooses, this is so that either the time the complaint was made or the time it was logged can be recording 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:

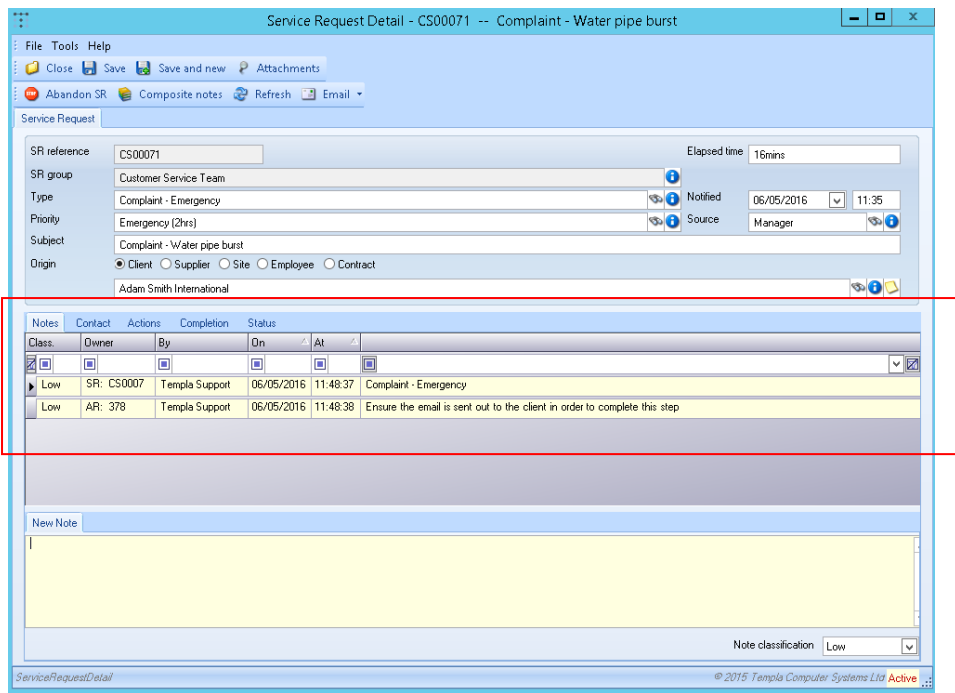


When happy with all the details on the screen click the **Activate SR** button, and click yes to the pop up box.

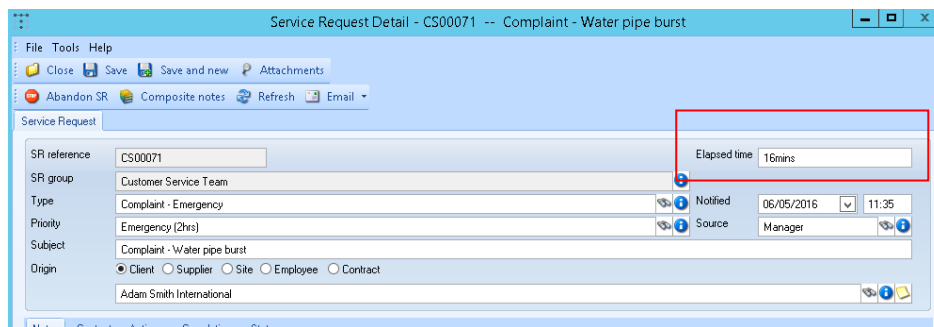


Activating an SR will have three effects.

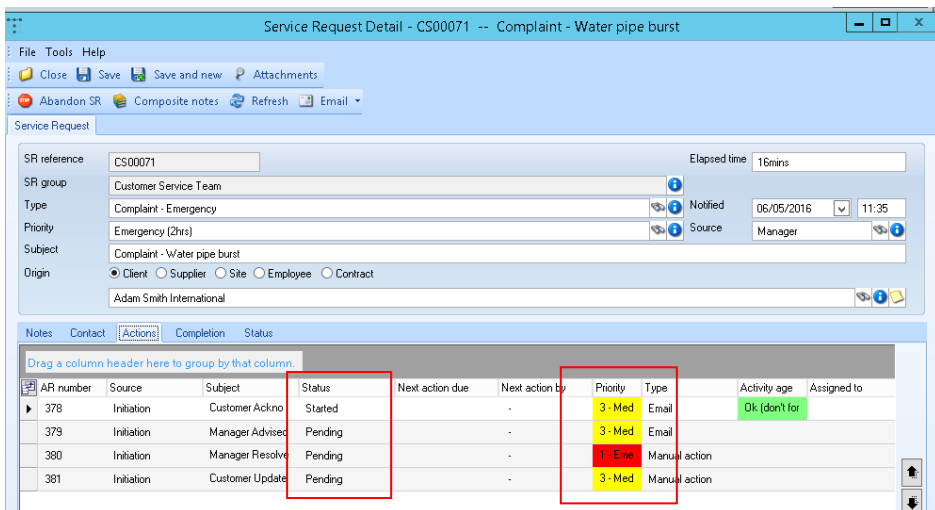
Firstly, it will update the notes tab with the actions taken so far:



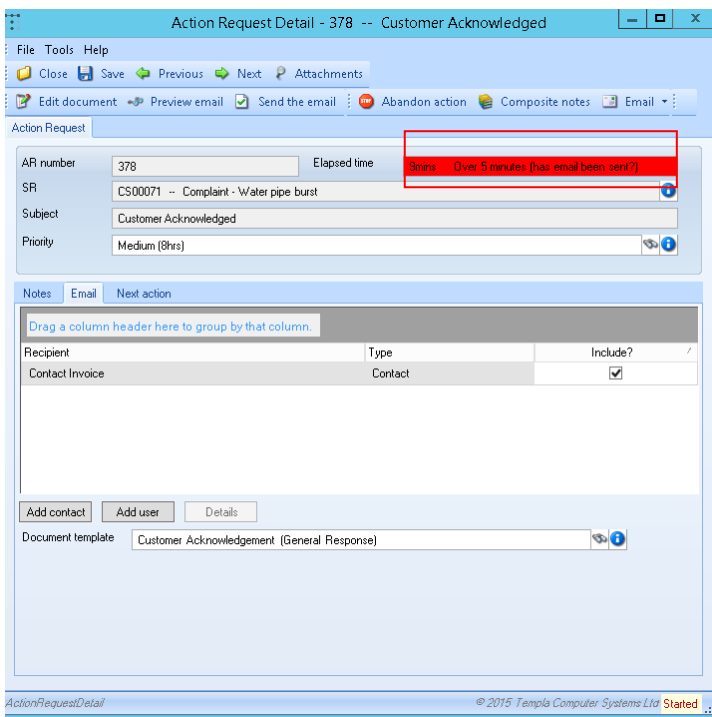
Secondly, it will begin to calculate the time that has elapsed since the SR was activated (based off of the notified date/ time set by the user):



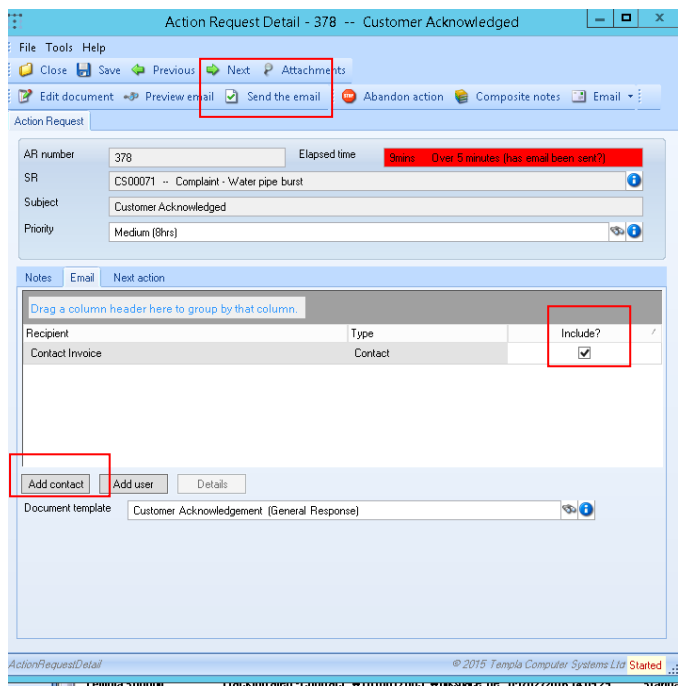
Thirdly, it will auto create a list of actions, displaying whether they have occurred yet and their importance based on a previously agreed list:



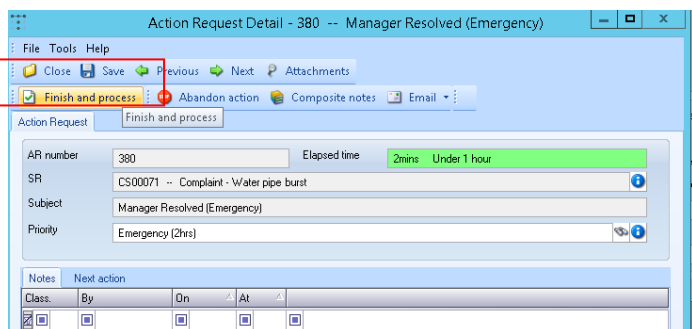
Double clicking on an action will launch a new window displaying all relevant details about the action, of most importance is the time elapsed box which will change colour depending on if the action has been taken within the specified limit:



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.

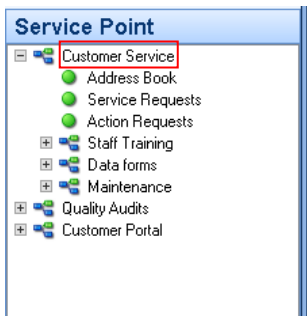


At this point built system processes such as emailing will automatically change the started status on the action list to completed and the next action on the list will be marked as started, however for none system based activities e.g. Waiting on manager resolved? The user must click on the finish and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

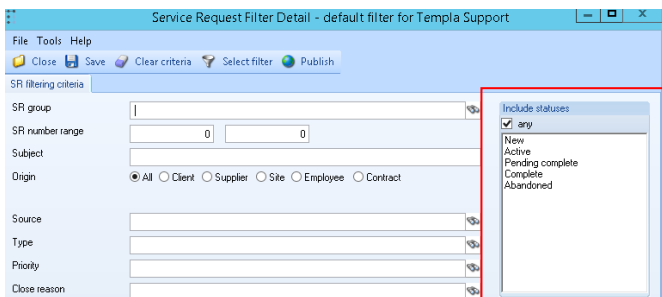


Viewing existing Service requests

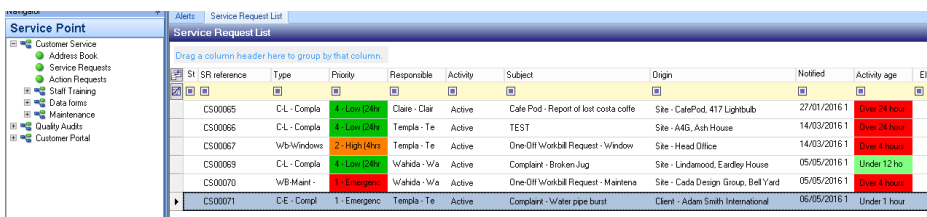
In order to view a list of already existing Service requests click the button under **Service point** → Customer service.



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.

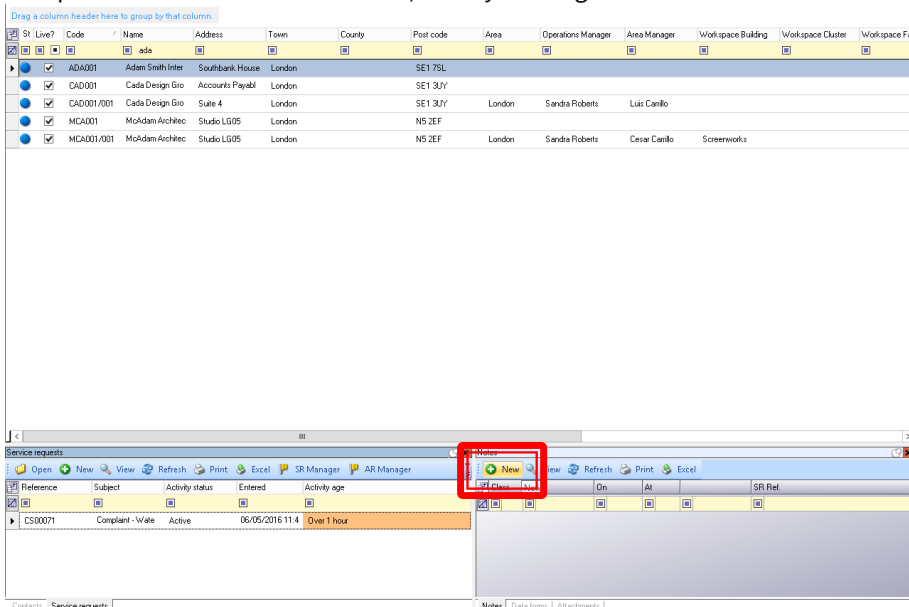


From the generated list it is possible to see all relevant details relating to an SR e.g. site, activity age, responsibility etc. Just like all other CMS grids the user can search by typing in the yellow box or filter by dragging and dropping:

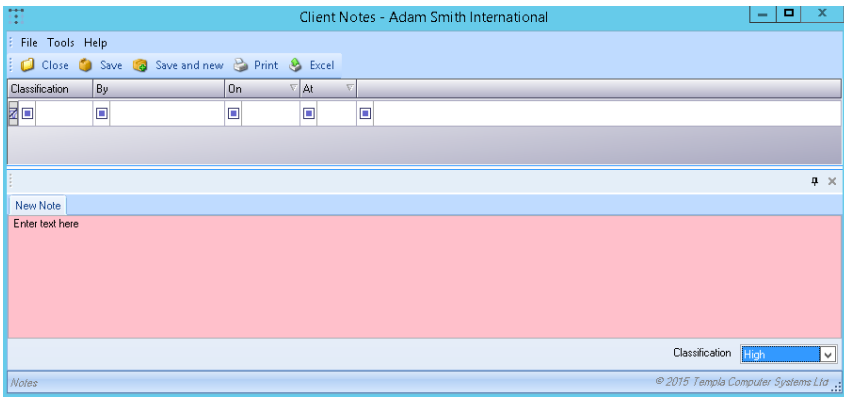


Adding notes

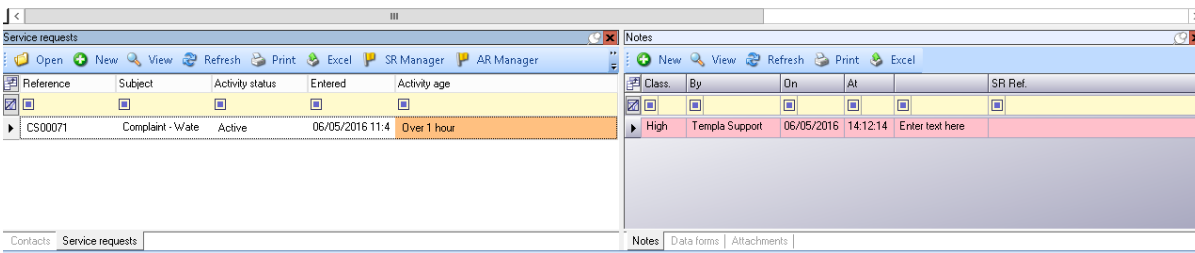
Also possible to add notes to a client/ site by clicking on the new button in the lefthand window.



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.





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