Alarm Manager Help Sheet

Service Calls

1. Introduction

This screen allows you to:

- Log and Complete Service Calls
- Check Outstanding Calls
- View the Service History for a particular customer

Click on the “Service” button on the Toolbar or from the menu select “Service”.

First open the required customer as follows:

Enter the Account No.
Or
Find the Customer using the “Accounts”, “Names” or “Search” options as described in the Customer Help Sheet.

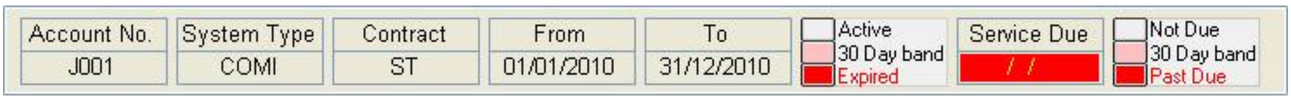
When you open a Customer the system will first check if that customer has any outstanding calls. If so, you will be asked if you want to view the list and you may then open one of those outstanding calls.

2. Log Call

This option allows you to Log a new call for the customer.

If the Customer has multiple Systems you will be required to select the System that the call relates to. Expired Systems will be displayed in Red.

A summary will be displayed showing the following details:



Note the following:

- If the Contract is expired the “To” date will be displayed in Red.
- If the Contract is due to expire within the next 30 days the “To” date will be displayed in Pink.
- If the Next Service Date is overdue, it will be displayed in Red.
- If the Next Service Date is due within the next 30 days, it will be displayed in Pink.

Once you have selected the Customer / System, you can enter the following details:

Call Type Enter code or select from drop down List

Call Date Defaults to current date and you can change as required, if the call has already been done you should change to the date of the actual call

Call Time Defaults to current time and you can change as required

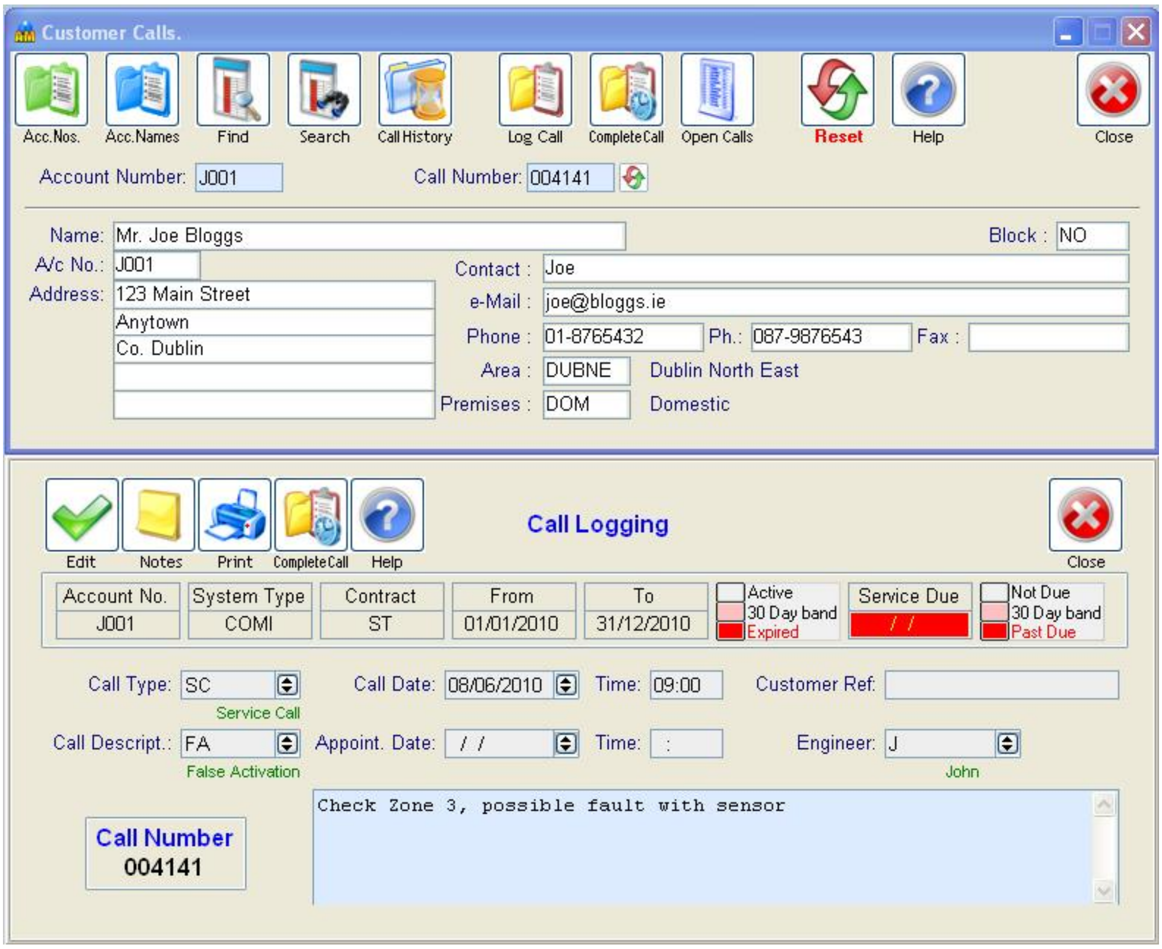
Customer Ref. Enter any reference regarding the customer/call or leave it blank

Call Description Enter code select from drop down List

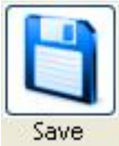
Appointment Date Optional

Appointment Time Optional

Engineer Enter code select from drop down List



Click on **Save**



Once you save the call you may click on:

Notes – to enter any notes related to the call

Print – to print all details entered for the Call

Complete call

This option allows you to complete the call immediately and you can do so if the call has already been completed. Otherwise the call remains outstanding and can be completed at a later stage.

For technical reasons, if you use this button to toggle to the Complete Call screen the Delete button on the Complete Call is disabled.   To re-enable it, exit the bottom screen and enter Complete Call directly.

If you wish to Log another call, you can close the bottom part of the screen and click on “Reset” to clear the customer details.

3. Complete Call

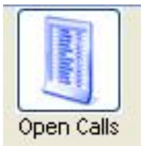
This option allows you to enter the Completion details for an Outstanding Call.

There are two ways of opening the required call, as follows:

1. Open the required Customer as described above. When asked if you want to view the Customers Open Calls, select Yes and select the required call from the list.

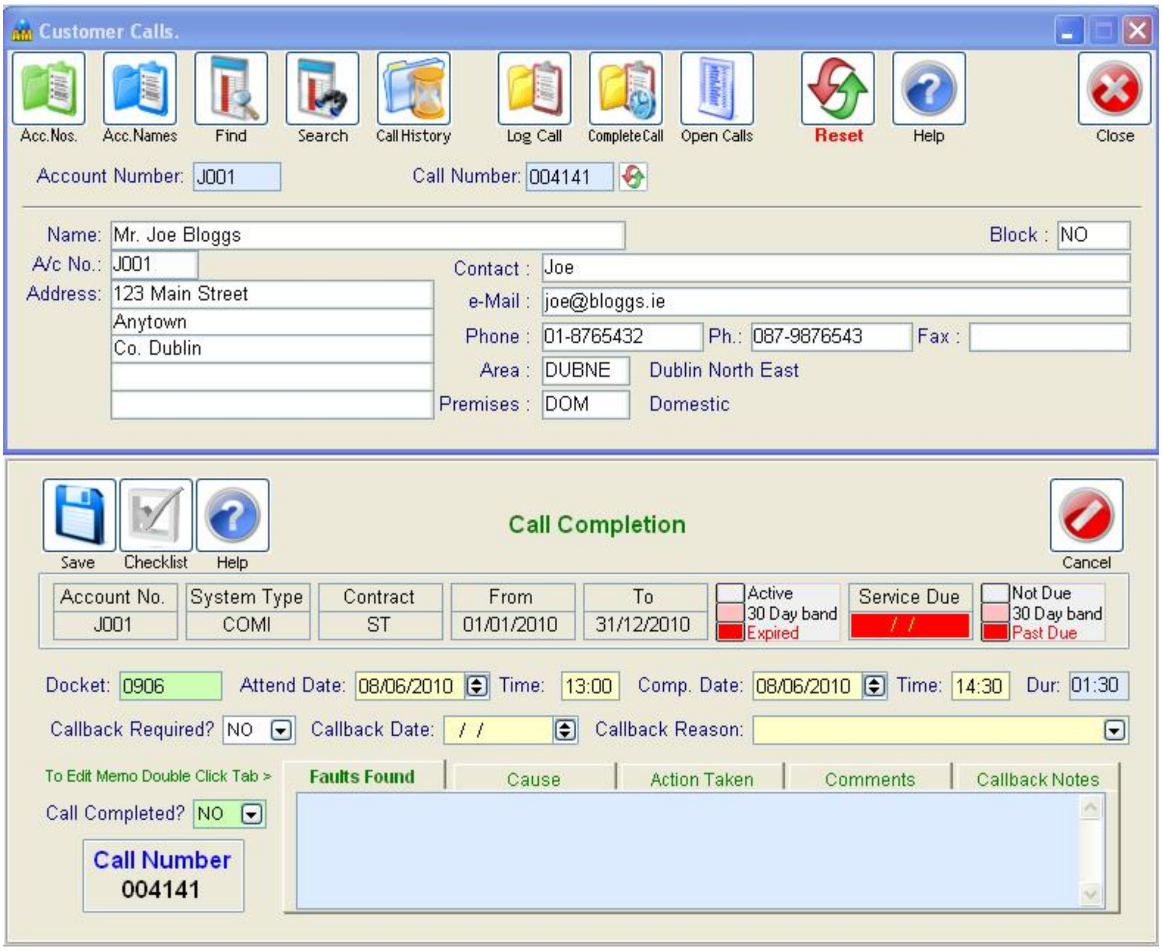
   Or

2. Click on the "Open Calls" button. This will list all Open Calls and you may select the required call.



When the list of Open Calls is displayed, it will be sorted by Call No., and the Call No. column will be highlighted in bold to indicate this. You can change the sort order of the list by right-clicking on any of the other columns, e.g. Account, Customer Name, Engineer, etc.

Once you have selected the required Call, you can click on the "Complete Call" button. You could also click on the "Log Call" button if you wish to view or edit the original details logged for the Call.

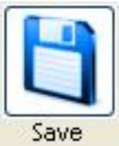


Click “Edit” to enter the following details:

Docket No.

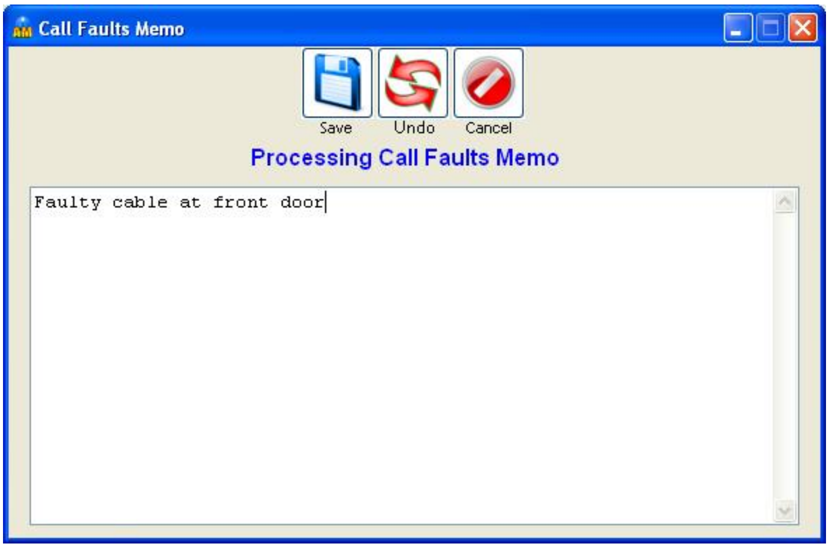
Attend Date	Enter the date the call was attended
Attend Time	Enter the time the call was attended in 24 hour format
Completed Date	Defaults to the Attend Date, change as required
Completed Time	Enter the time the call was completed in 24 hour format
Duration	This is automatically calculated, no. of hours and minutes on-site
Callback Required	Yes or No, defaults to No
Callback Date	Enter if Callback is required
Callback Reason	If a Callback is required, select the reason from drop down List A new call will be logged for the Callback once this call is Saved.
Call Competed	Yes or No (defaults to Yes)

Click on Save



Once you save the call you may click on any of the following sections in order to enter the relevant notes:

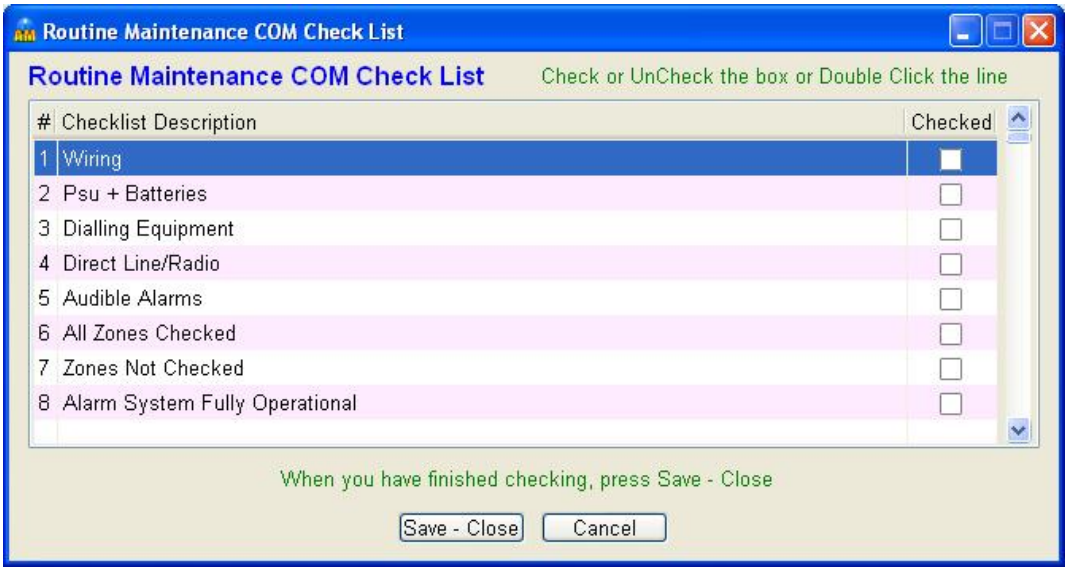
Double-Click on the tab heading to open the relevant screen and enter the required information.



Print – to print all details for the Call click on the Print button.

Checklist
If the call being completed is of a type defined as a "Routine Maintenance" Call (this is done in Data Maintenance – Service Call Types), you will see a button called "Checklist".

This allows you to record the Routine Maintenance Checklist. The following example shows a Routine Maintenance Checklist screen for an Intruder Alarm Routine Maintenance call:



You can double click on a Checkbox to check that particular item.

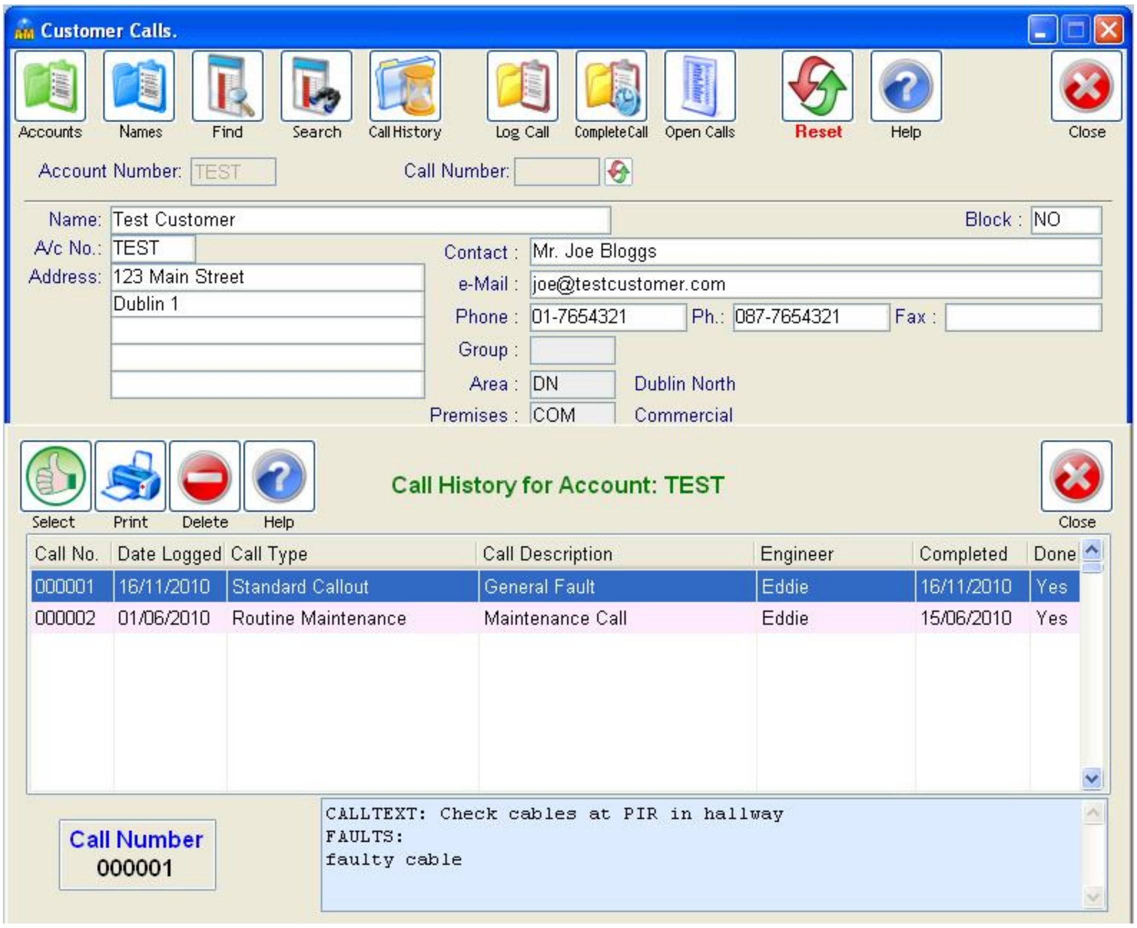
Click on the "Save – Close" button when complete.

You can setup the Checklist items for each System Type in Data Maintenance – Routine Maintenance Checklists. By default each System Type has a Checklist like the example above and you may change these as required.

4. Call History

This option allows you to view a list of Calls for the customer.

Calls are displayed in reverse order of date i.e. with the most recent call at the top of the list.



As you scroll up and down or select a call, the call notes are displayed below the list.

Print – Prints the list of calls

Select - Opens the selected call to view or edit

Once you open a call you can then open the “Log Call” or “Complete Call” screens to view or edit the data.

5. <u>Deleting a Call</u>

While in the Call History screen you can delete a Call if required.

To do so, you must be logged in as the Admin user.

Select the required Call and press the Delete button.

You will be asked to confirm your intention of deleting the call and once you confirm, the Call will be permanently deleted from the system beyond trace.