

Creating a Maintenance Issue

This document details the steps for Creating a Maintenance Issue within a Customer record. Maintenance Issues may also be created on Dealer, Authority, Branch, Global Keyholders, and other entity records. When created at these levels they are believed to pertain specifically to these entities.

There are two standard ways to begin creating a Maintenance Issue: 1. An issue arises during an alarm, most often a bad telephone number, or 2. A customer requests a data change or technical service for their account. This guide covers the latter.

Step 1 - Load the Customer Record.

Step 2 - Navigate to the Maintenance Issues form.

Step 3 - Click Edit

Step 4 - Click Create New

The Contact type and the Contact ID automatically loads with the customer details of the loaded customer. If this was a data issue related to an individual on the contact list it is possible to select that person from the drop down. It is also possible to select a priority and even assign a technician, set an appointment date, and select a service type if that information is available at this time. If all you have is the customer request, simply enter the details of the customer's request and click save changes. This commits the changes to the queue. Remember to save the customer record. This generates a prompt to note any changes to the Maintenance issue, if there are any.



Additional Information

- Maintenance Issues can be found individually on the entity records or under the Maintenance Menu in both the Operator and Supervisor Workstations.
- Once changes are made, it is possible to document within the notes section, which enables the update notes and resolve issues buttons and resolve the item from the dialog.
- The Notes section maintains a running long of any updates made and by whom.

New Maintenance Issue

Contact type: Customer Contact ID: CC100

Name: Cratter's Cafe #100 Technician: [dropdown]

Person: [dropdown] Tech On Site: ☐

Priority: [0 Not Assigned] Appl Date: [dropdown] 12:00:00 AM

Issue: 0 Service Type: [dropdown]

Logged: 01/05/2017 13:14:39 Last Action:

User: CM Resolved:

Description: Customer requests a battery replacement.

Save Changes Cancel

Maintenance Issue

Outstanding Maintenance Issue. Did you resolve this issue?

Customer requests a battery replacement.

Notes:

New Notes:

Update Notes Resolve Issue Take No Action