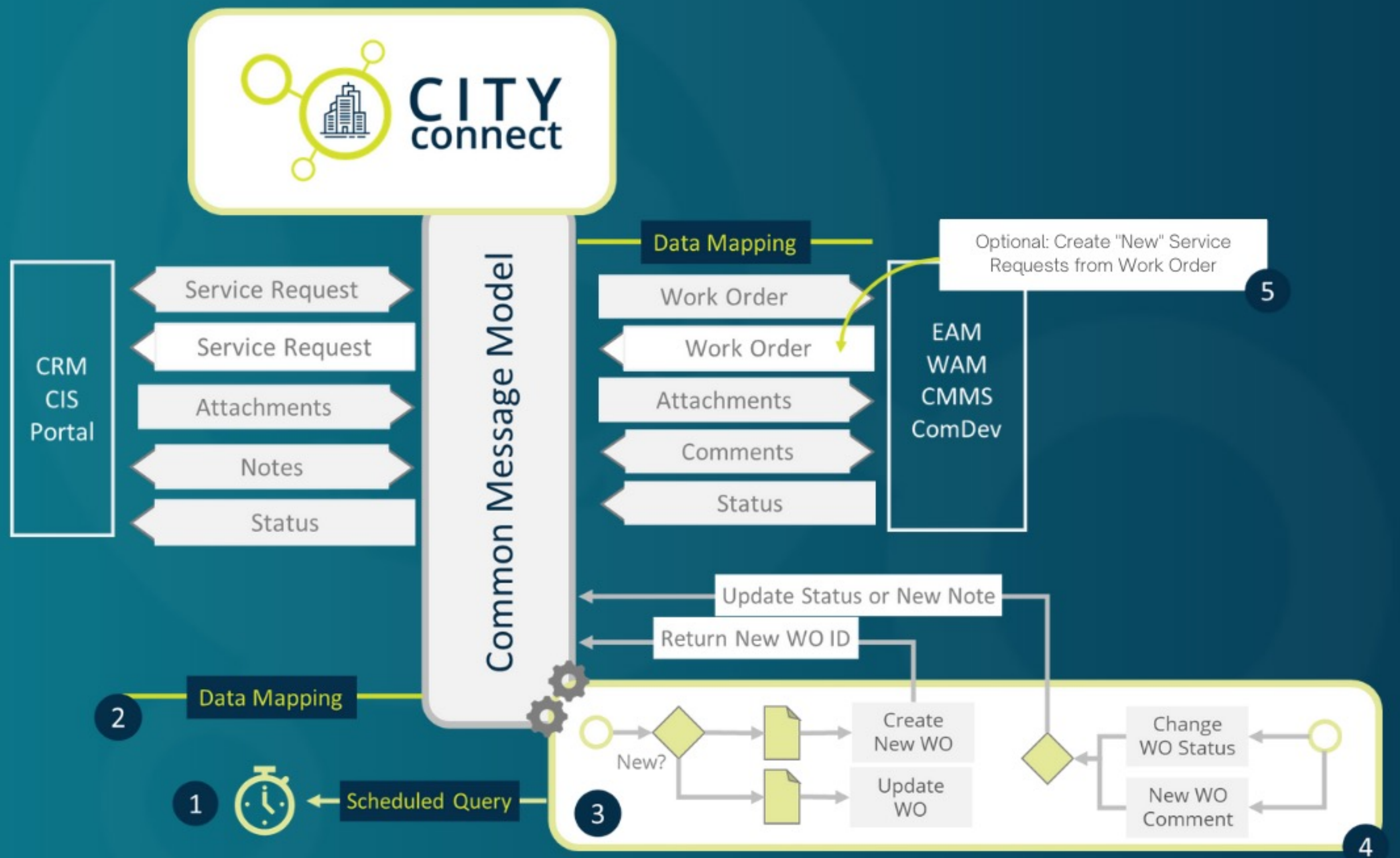
Service Request Automation

Create a new work order or service request in your work management, utility billing, bylaw enforcement, or recreation systems from your customer portal. Notify customers of status and comments from service personnel.



1. The Automation performs a Scheduled Query against the case or service request data object in your CRM, Utility Billing (CIS) or Customer Portal systems.
2. Service Requests and associated notes and attachments are mapped to the Common Message Model.
3. Each message is tagged as "New" or "Updated". New work orders are created in your work and asset management system, and the service request in your CRM is updated with a work order ID. If a work order ID already exists, then it is queried in your work and asset management system and mapped fields are updated.
4. Any changes to status on the work order is updated through the Common Message Model in your CRM, CIS, or Customer Portal. If field services have added comments to the Work Order, this can be reflected in the CRM as either public comments to the customer, or private comments visible to your customer service personnel.
5. Some customers also like to have their active work orders synchronized to the CRM so that customer service personnel can see all work and associate incoming service requests directly, or create new work orders if it is indeed a brand new service request.