

SERVICE

INTRODUCTION TO CALL ADMINISTRATION

The Call Administration screen is part of the Extended Call Centre - Version Compatibility¹

Extended Call Centre mode has been introduced, which can be used for larger customer-user bases. When using the **Calls Lite** mode only be primarily used for logging, releasing, and assigning calls and the **Call Administration** screen aids in call processing.

Call Centre Mode

Extended Call Centre - Version Compatibility²

Two screens have been added for <u>SLA Management</u> and <u>Call Closure Excep</u><u>tions</u>. to assist with call screen performance enhancements and to have dedicated screens where these functions are managed.

In addition, an Extended Call Centre mode has been introduced, which can be used for larger customer-user bases where Call processing functionality has been split into two screens: Calls Lite and <u>Call Administration</u> Introduction topics. The Calls Lite is a simplified Call screen with increased performance enhancements.

For smaller customer-user bases, the original Call Listing screen can be used, with some modifications for speed gains.

1BPO2 v2.5.1.3 or higher. 2BPO2 v2.5.1.3 or higher.



MODIFIED CALL LISTING SCREEN (EXTENDED CALL CENTRE OFF)

Configuration

- Extended Call Centre configuration flag = 'No'
- User rights:
 - BPO > Service
 - Calls Full Access
 - Calls Lite No Access
 - Call Administration No Access

Modifications

- Call status counts have been removed.
- Closed call listing has been removed.
- Date range search removed.
- SLA counts have been removed.
- Search by call reference will now open the call maintain screen if the matched call is closed.

CALLS LITE LISTING SCREEN (EXTENDED CALL CENTRE ON)

Configuration

- Extended Call Centre configuration flag = 'Yes'
- User rights:
 - BPO > Service
 - Calls RIB_SCAL No Access
 - Hold, Pending, Start and End Work rights can be restricted where Calls Lite users do not



need this access, i.e. segregation of duties is enforced and these functions will be handled by the Users who have access to the Call Administration screen.

- Calls Lite Full Access for Users who Log, Edit and Assign Calls
- Call Administration Full Access for Users who will Manage Calls

Modifications

- Call status counts have been removed.
- Closed call listing has been removed.
- Date range search removed.
- SLA counts have been removed.
- Call processing features removed.
- Search by call reference will now open the call maintain screen if the matched call is closed.
- Underlying work orders and assignments for calls have been removed.

THE CALL ADMINISTRATION SCREEN

Ribbon Select Service > Call Administration



• The *Call Administration* screen will be displayed.



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				Samanthas Dine	r	60 08/08/201	4 Awaiting Ac	Wesley Har	. 11:52:16	New machine	NDS	New Deal Sale			
		- 1		Westwood Dyni	mic	62 08/08/201	4 Awaiting Ac	Wesley Har	. 13:12:15	Machine Rental Deal	NDR	New Deal Rental			
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			CN0000069	Danny Storm IT	Cafe	71 23/09/201	4 Awaiting Ac	Daniel Balgo.	13:16:20	Toner for delivery	TON	Toner Required			
		= 1	E CN0000070	Derton / Techno	logies	72 23/09/201	4 Awaiting Ac	Daniel Balgo.	13:45:10	Service machine	SERV	Service			
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			E CN0000109	Titan Group		26/02/201	5 Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair			
			CN0000125	Derton / Techno	logies	06/03/201	5 Awaiting Ac	Carolina Su	09:37:02	test	REP	Repair			
			CN0000127	Derton / Techno	logies	06/03/201	5 Awaiting Ac	Carolina Su.	10:09:53	test	SERV	Service			
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RIBBON ACTION BUTTONS

MAINTAIN ACTION BUTTONS

 From the Call Screen click on *Edit* to be directed to the *Call maintenance* screen. Refer toCall Administration - Edit a Call

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		Titan Group	86 11/11/2014	Awaiting Ac	George Jam.	. 16:17:59	Magenta toner required	TON	Toner Required			
		Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam.	. 16:21:59	CO789	NDS	New Deal Sale			
		Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
		Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair			
		Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	09:37:02	test	REP	Repair			
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		Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
	Count: 38											



STATE ACTION BUTTONS

- Filter the list of calls by **Site** and **Status**
- The call listing can be **Refreshed**.
- Calls can be filtered by selecting *My Calls*. Refer to Call Administration - My Calls

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	E CN0000056	Young Electric	58 07/08/2014				Contract Closure - CO0000021	DR	Select Call Type			
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		Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac			Test BPO fin tran	NDS	New Deal Sale			
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		Panda Copiers	87 11/11/2014	Awaiting Ac			CO789	NDS	New Deal Sale			
		Westwood Dynamic	96 08/01/2015		George Jam		staple unit for rental on current contract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
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		Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
	Count: 38											

FORMAT BUTTONS

- **Save Layout** Saves any changes made to the data grid, such as changing column width.
- Workspaces Saves layout preferences.
- Save Filter Saves any applied filters set on the data grid.



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WORK ACTION BUTTONS

- My Call will assign a call to the user who is currently logged onto BPO.
- <u>Assign</u> will assign a call to an employee and will move the call to the In Progress status.
- <u>Start</u> will begin the Start Work process for the Call.

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	E CN0000042	Samanthas Diner	42 21/07/2014				Machine repair needed	REP	Repair			
	E CN0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			
	E CN0000047	Titan Group	47 31/07/2014	Awaiting Ac	George Jam	14:13:49	Service required	SERV	Service			
Work In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			
		Titan Group	57 07/08/2014	Awaiting Ac	Belinda Sha	12:14:38	Toner required	TON	Toner Required			
	E CN0000056	Young Electric	58 07/08/2014	Awaiting Ac	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
Notes		Westwood Dynamic	59 08/08/2014	Awaiting Ac	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required			
100003		Samanthas Diner	60 08/08/2014	Awaiting Ac	Wesley Har	11:52:16	New machine	NDS	New Deal Sale			
		Westwood Dynamic	62 08/08/2014	Awaiting Ac	Wesley Har	13:12:15	Machine Rental Deal	NDR.	New Deal Rental			
	E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac	Wesley Har	12:26:58	Machine service required	SERV	Service			
Assignments 2		Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac	Daniel Balgo	11:23:30	Test BPO fin tran	NDS	New Deal Sale			
	E CN0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac	Daniel Balgo	13:16:20	Toner for delivery	TON	Toner Required			
	E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac	Daniel Balgo	13:45:10	Service machine	SERV	Service			
	E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac	Karlien Jessi	11:04:32	Machine service required	SERV	Service			
		Derton / Technologies	75 25/09/2014	Awaiting Ac	Karlien Jessi	11:41:18	test	NDS	New Deal Sale			
	E CN0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac	Karlien Jessi	12:07:35	Service and toner required	SERV	Service			
		Titan Group	86 11/11/2014	Awaiting Ac	George Jam	16:17:59	Magenta toner required	TON	Toner Required			
	E CN0000085	Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam	16:21:59	CO789	NDS	New Deal Sale			
	E CN0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
	E CN0000109	Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair			
		Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	09:37:02	test	REP	Repair			
For Contract		Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service			
	E CN0000135	Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
	Count: 38	1										

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PROCESS ACTION BUTTONS

- <u>Close</u> a call when there are no further outstanding items on the call. Closed calls can only be viewed in the All status and cannot be re-opened once they have been closed.
- <u>Complete</u> a call once a technician has completed the required work. Outstanding admin work, like updating or Invoicing the call, can still be done.
- <u>Hold</u> will place a call on hold when work needs to be stopped while a customer issue is being resolved. The SLA monitor will be "paused" until the call has been released from hold.
- <u>Pending</u> differs from hold, in that work will be stopped to resolve an internal company issue, such as unavailability of stock. The SLA Monitor will continue to run for calls in this status.
- <u>Release</u> a call that has been placed on hold or pending. The call will move back to the New status where it can be re-assigned.
- <u>Reinstate</u> a call that has been closed. The call will move back to New status where it can be re-assigned.

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unctions	► E CN0000040	Westwood Dynamic	40 21/07/2014				Service machine S/N: 1912-102036	SERV	Service			
	E CN0000042	Samanthas Diner	42 21/07/2014				Machine repair needed	REP	Repair			
	E CN0000042	Office Supplies Unlimited	44 28/07/2014				1 black toner for collection	TON	Toner Required			
	E CN0000047	Titan Group	47 31/07/2014		George Jam		Service required	SERV	Service			
Work In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014				Toner for delivery	TON	Toner Required			
nokarriogeas	E CN0000055	Titan Group	57 07/08/2014				Toner required	TON	Toner Required			
	E CN0000056	Young Electric			Belinda Sha		Contract Closure - CO000021	DR	Select Call Type			
		Westwood Dynamic	59 08/08/2014		Belinda Sha		Deliver full set of toners	TON	Toner Required			
Notes		Samanthas Diner	60 08/08/2014				New machine	NDS	New Deal Sale			
	E CN0000060	Westwood Dynamic	62 08/08/2014				Machine Rental Deal	NDR	New Deal Rental			
	E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac		12:26:58	Machine service required	SERV	Service			
Assignments 2		Danny Storm IT Cafe	69 23/09/2014		Daniel Balgo.		Test BPO fin tran	NDS	New Deal Sale			
	E CN0000069	Danny Storm IT Cafe	71 23/09/2014				Toner for delivery	TON	Toner Required			
	E CN0000070	Derton / Technologies	72 23/09/2014		Daniel Balgo		Service machine	SERV	Service			
Hold History	E CN0000072	Derton / Technologies	74 25/09/2014		Karlien Jessi		Machine service required	SERV	Service			
		Derton / Technologies	75 25/09/2014				test	NDS	New Deal Sale			
	E CN0000075	Derton / Technologies	77 26/09/2014				Service and toner required	SERV	Service			
	E CN0000084	Titan Group	85 11/11/2014				Magenta toner required	TON	Toner Required			
	E CN0000085	Panda Copiers	87 11/11/2014				CO789	NDS	New Deal Sale			
	E CN0000094	Westwood Dynamic	96 08/01/2015				staple unit for rental on current contract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
On Site Info	E CN0000109	Titan Group	26/02/2015		Carolina Su		Test machine	REP	Repair			
	E CN0000125	Derton / Technologies			Carolina Su		test	REP	Repair			
	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac		10:09:53	test	SERV	Service			
	E CN0000135	Mary Contrary			Carolina Su		New customer contact call	DR.	Select Call Type			
	Count: 38	1										



PRINT

The Print action button will display a drop-down menu with report options that can be selected for a call;

- Call Report
- Items Issued
- Delivery Report
- Service History
- Customer Service History

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unctions	Y ID:	AD:	CalDate	RD:	ill:	(D:	(Description	Service History - Serial No. 19-12/1202	pe	(D:	ill:	ID:	
uncuons							-	Customer Service History			10.	10-	
Work Orders 1	E CN0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac		13:26:10	Service mach		ļ	Service			
		Samanthas Diner	42 21/07/2014	Awaiting Ac		13:59:38	Machine repair 1 black toner f			Repair			
	E CN0000044	Office Supplies Unlimited Titan Group	44 28/07/2014 47 31/07/2014				1 black toner to Service require			Toner Required Service			
Work In Progress	E CN0000047	Westwood Dynamic	4/ 31/07/2014 51 05/08/2014	Awaiting Ac	George Jam.	13:00:23	Toner for dely			Toner Required			
work in Progress	E CN0000051	Titan Group	57 07/08/2014				Toner required			Toner Required			
	E CN0000055		57 07/08/2014					re - CO000021 DR		Select Call Type			
	E CN0000056	Young Electric Westwood Dynamic			Belinda Sha	14:14:11	Deliver full set			Toner Required			
Notes			59 08/08/2014	Awaiting Ac			New machine	NDS		New Deal Sale			
	CN0000058 CN0000060	Samanthas Diner Westwood Dynamic	60 08/08/2014 62 08/08/2014			11:52:16	Machine Renta			New Deal Rental			
	E CN0000063		65 20/08/2014			12:26:58	Machine service			Service			
Assignments 1	E CN0000063	Young Electric Danny Storm IT Cafe		Awaiting Ac	Daniel Balgo		Test BPO fin to			New Deal Sale			
			69 23/09/2014							Toner Required			
		Danny Storm IT Cafe Derton / Technologies	71 23/09/2014	Awaiting Ac	Daniel Balgo	13:15:20	Toner for delv			Service			
Hold History	E CN0000070		72 23/09/2014 74 25/09/2014		Karlien Jessi.		Service machin Machine service			Service			
	E CN0000072	Derton / Technologies	79 25/09/2019					required SERV		New Deal Sale			
	E CN0000075	Derton / Technologies			Karlien Jessi.		test			Service			
	E CN0000075	Derton / Technologies Titan Group	77 26/09/2014 86 11/11/2014				Service and to			Toner Required			
	E CN0000084	Panda Copiers					Magenta tone CO789	required TON NDS		New Deal Sale			
	E CN0000094	Westwood Dynamic	87 11/11/2014 96 08/01/2015		George Jam.			rental on current contract. NDR		New Deal Sale			
	E CN0000094	Bothas Networking inc	96 08/01/2015	Awareng Ac UnAssigned	George Jam	15:07:45	test first work			New Deal Rental Service			
On Site Info	E CN0000099	Titan Group	26/02/2015		Carolina Su		Test machine	order SERV		Repair			
	E CN0000125	Derton / Technologies	06/03/2015		Carolina Su	09:32:00	test machine	REP		Repair			
	E CN0000125	Derton / Technologies	06/03/2015	Awaiting Ac		10:09:53	test	KEP SER/		Service			
		Mary Contrary	27/05/2015	Awaiting Ac	Caroina Su	00:43:05	New customer	DR DR		Select Call Type			
	Count: 38												

REPORTS

The Reports button will display the system data reports for the Service Centre report.



Service - Introduction to Call Administration

Home Eq Durban Edit New	uipment / Locations Co Co Refresh My Calls	🔣 Save Layout	🚜 My Call	8 🚱	Þ 4	ending Release	1	s Se	Reports	Reporting Utilities					8
									Name	2		Description			
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	,o CalReference	CustomerName	CalDate	CaliState	Technician	CalTime	Description			ervice Centre			ErrorCode	ErrorCodeDesc	S
Functions	7 10:	×D:			×D:	×D:	(D:			Housekeeping			*D:	×D:	1
unctions	E CN0000040	Westwood Dynamic	40 21/07/2014				Service machine	C AL 10		Performance					3
	► E CN0000042	Samanthas Diner	42 21/07/2014				Machine repair n			Troubleshooting					
	E CN0000044	Office Supplies Unlimited	44 28/07/2014				1 black toner for								1
	E CN0000047	Titan Group	47 31/07/2014	Awaiting Ac			Service required								
Work In Progress	E CN0000051	Westwood Dynamic	51 05/08/2014				Toner for deliver								
	E CN0000055	Titan Group	57 07/08/2014				Toner required								
	E CN0000056	Young Electric	58 07/08/2014				Contract Closure								
Notes	E CN0000057	Westwood Dynamic	59 08/08/2014				Deliver full set of								
		Samanthas Diner	60 08/08/2014	Awaiting Ac	Wesley Har		New machine								
	E CN0000060	Westwood Dynamic	62 08/08/2014				Machine Rental D	Deal							
	E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac	Wesley Har.	12:26:58	Machine service	required							
	E CN0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac	Daniel Balgo.	11:23:30	Test BPO fin tran	1							
	E CN0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:20	Toner for deliver	v	7			Edit Filter			
	E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac	Daniel Balgo.	13:45:10	Service machine		-		SERV	Service			
	E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac	Karlien Jessi	11:04:32	Machine service	required	ł		SERV	Service			
	E CN0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlien Jessi	11:41:18	test				NDS	New Deal Sale			
	E CN0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac	Karlien Jessi	12:07:35	Service and tone	er requin	ed		SERV	Service			
		Titan Group	86 11/11/2014	Awaiting Ac.	George Jam.	16:17:59	Magenta toner n	equired			TON	Toner Required			
		Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam.	16:21:59	CO789				NDS	New Deal Sale			
	E CN0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam.	15:07:45	staple unit for re	ntal on	current co	ntract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work or	der			SERV	Service			
	E CN0000109	Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine				REP	Repair			
	E CN0000125	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	09:37:02	test				REP	Repair			
For Contract	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test				SERV	Service			
	⊞ CN0000135	Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer co	ontact ci	al		DR.	Select Call Type			
	Count: 38														
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Related Topics

- Service Introduction to Call Administration
- Call Administration Edit a Call
- Call Administration My Calls
- Call Administration Assign a Call
- Call Administration Start or End Work
- Call Administration Close a Call
- Call Administration Complete a Call
- Call Administration Hold a Call
- Call Administration Pend a Call
- Call Administration Release a Call
- Call Administration Reinstate a Call

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