

# SERVICE

## INTRODUCTION TO CALL ADMINISTRATION

The Call Administration screen is part of the Extended Call Centre - Version Compatibility<sup>1</sup>

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 Compatibility<sup>2</sup>

Two screens have been added for [SLA Management](#) and [Call Closure Exceptions](#), 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 [Call Administration](#) 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.

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<sup>1</sup>BPO2 v2.5.1.3 or higher.

<sup>2</sup>BPO2 v2.5.1.3 or higher.

## **MODIFIED CALL LISTING SCREEN (EXTENDED CALL CENTRE OFF)**

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### ***Configuration***

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

### ***Modifications***

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- 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)**

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### ***Configuration***

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- 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.

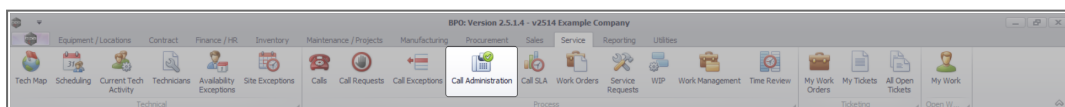
- Calls Lite - Full Access - for Users who Log, Edit and Assign Calls
- Call Administration - Full Access - for Users who will Manage Calls

### **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.

Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

My Call My Call Assign Close Complete Hold Pending Release Reroute Print Reports

State Format Work Process Print Repo

Links: Enter text to search...

Functions: Work Orders 1, Work In Progress, Notes, Assignments 2, Hold History, Pending History, On Site Info, For Contract

CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine 5/No 1912-102036	SERV	Service			19
CH0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jam.	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha.	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har.	11:52:16	New machine	NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har.	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har.	12:26:58	Machine service required	SERV	Service			50
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo.	11:23:30	Test BPO fir tran	NDS	New Deal Sale			
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:16:30	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi.	11:04:32	Machine service required	SERV	Service			ab
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi.	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi.	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jam.	16:17:59	Nagenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jam.	16:21:59	CO789	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bobbas Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su.	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su.	08:45:05	New customer contact call	DR	Select Call Type			

Count: 381

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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 to [Call Administration - Edit a Call](#)

Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

My Call My Call Assign Close Complete Hold Pending Release Reroute Print Reports

State Format Work Process Print Repo

Links: Enter text to search...

Functions: Work Orders 1, Work In Progress, Notes, Assignments 2, Hold History, Pending History, On Site Info, For Contract

CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine 5/No 1912-102036	SERV	Service			19
CH0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jam.	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha.	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har.	11:52:16	New machine	NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har.	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har.	12:26:58	Machine service required	SERV	Service			50
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo.	11:23:30	Test BPO fir tran	NDS	New Deal Sale			
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:16:30	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi.	11:04:32	Machine service required	SERV	Service			ab
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi.	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi.	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jam.	16:17:59	Nagenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jam.	16:21:59	CO789	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bobbas Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su.	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su.	08:45:05	New customer contact call	DR	Select Call Type			

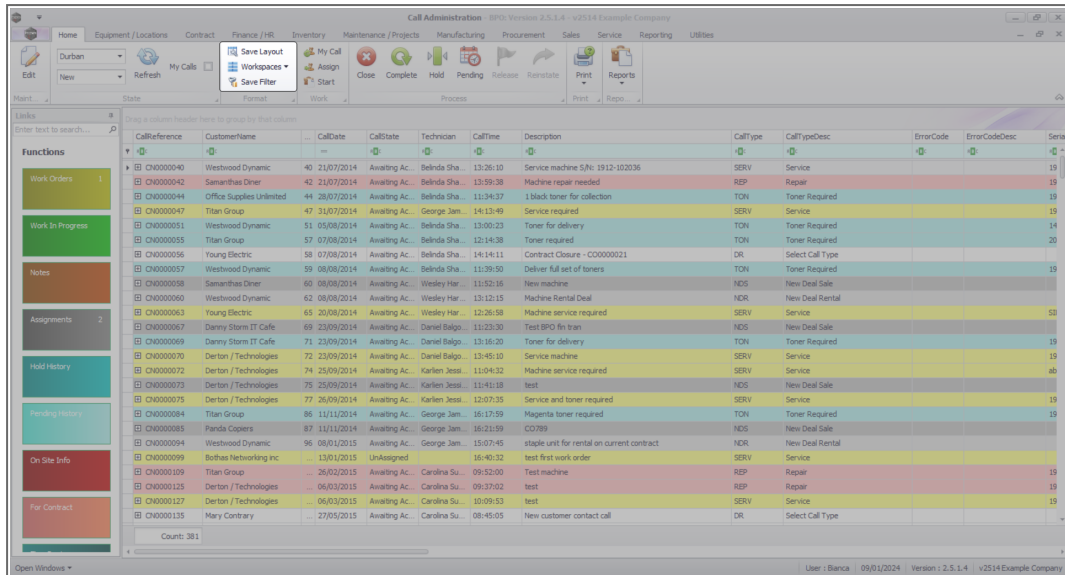
Count: 381

User : Bianca 09/01/2024 Version : 2.5.1.4 v2514Example Company

- 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](#)

## FORMAT BUTTONS

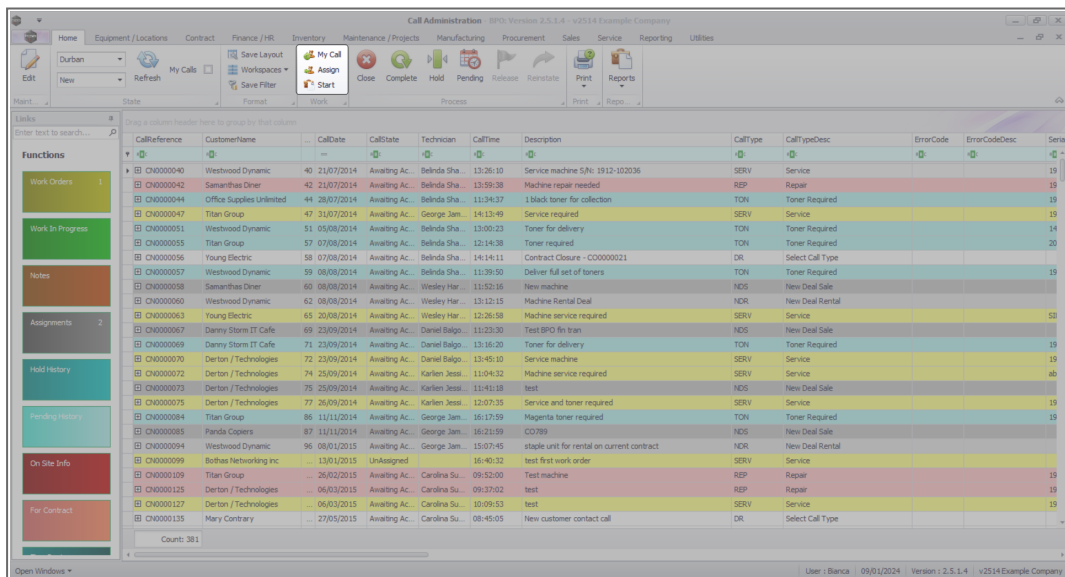
- **Save Layout** - Saves any changes made to the data grid, such as changing column width.
- **Workspaces** - Saves layout preferences.
- **Save Filter** - Saves any applied filters set on the data grid.



The screenshot shows the 'Call Administration' software interface. The top menu bar includes Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The 'Service' menu is active, showing options like My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Reallocate, Print, and Reports. The main window displays a table of calls with columns: CallReference, CustomerName, CallDate, CallState, Technician, CallTime, Description, CallType, CallTypeDesc, ErrorCode, ErrorCodeDesc, and Serial. The table contains 381 calls, with a count of 381 at the bottom. The left sidebar shows 'Functions' with categories: Work Orders (1), Work In Progress, Notes, Assignments (2), Hold History, Pending History, On Site Info, and For Contract.

## WORK ACTION BUTTONS

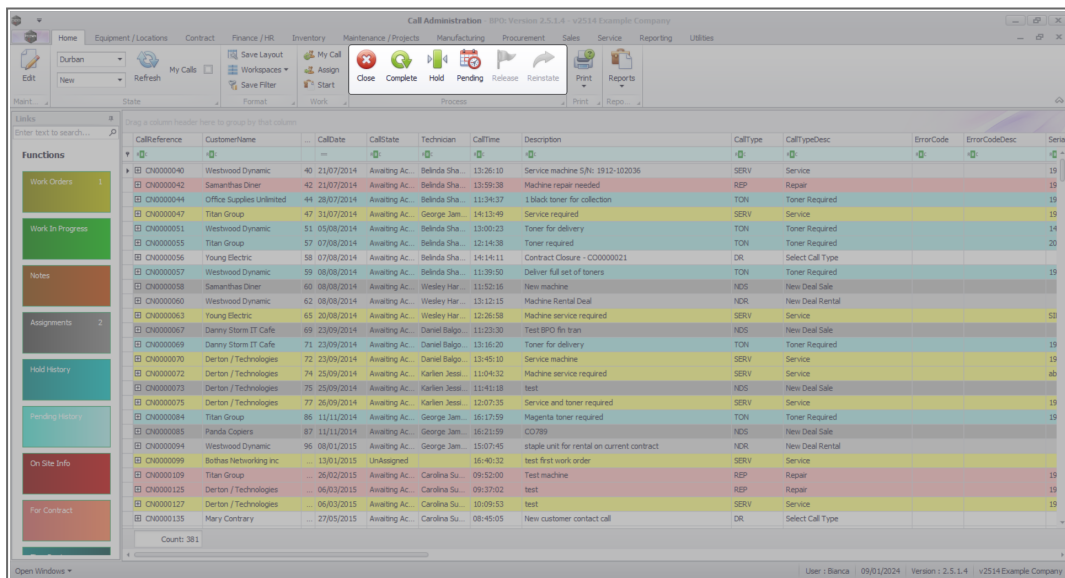
- **My Call** will assign a call to the user who is currently logged onto BPO.
- **Assign** will assign a call to an employee and will move the call to the In Progress status.
- **Start** will begin the Start Work process for the Call.



This screenshot is identical to the one above, showing the 'Call Administration' software interface. The 'My Call' button in the 'Service' menu is highlighted with a red box, indicating its function as described in the text.

## PROCESS ACTION BUTTONS

- **Close** 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.
- **Complete** a call once a technician has completed the required work. Outstanding admin work, like updating or Invoicing the call, can still be done.
- **Hold** 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.
- **Pending** 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.
- **Release** 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.
- **Reinstate** a call that has been closed. The call will move back to New status where it can be re-assigned.

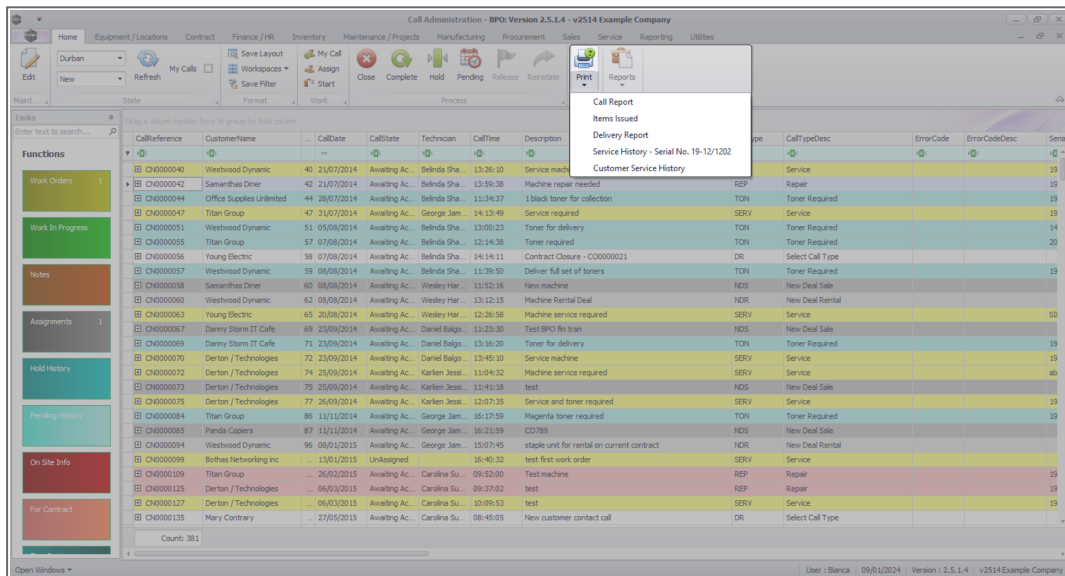


CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	Service machine 5N: 1912-102036	SERV	Service			19
CH0000042	Samantha Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jen.	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	Contract Closure - CO0000021	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha.	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samantha Diner	60 08/08/2014	Awaiting Ac.	Wesley Har.	New machine	NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 20/08/2014	Awaiting Ac.	Wesley Har.	Machine Rental Deal	NDR	New Deal Rental			
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har.	Machine service required	SERV	Service			52
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo.	Test BPO fit train	NDS	New Deal Sale			
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo.	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karljen Jess.	Machine service required	SERV	Service			46
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karljen Jess.	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 25/09/2014	Awaiting Ac.	Karljen Jess.	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jen.	Magenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jen.	CO799	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/11/2015	Awaiting Ac.	George Jen.	staple unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bethel Networking inc	13/01/2015	Unassigned		test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Caroline Su.	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Caroline Su.	New customer contact call	DR	Select Call Type			

## 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



## REPORTS

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



Call Administration - BPO: Version 2.5.1.4 - v2514 Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

My Calls Workspaces Assign Close Complete Hold Pending Release Reinstate Print Reports

State: Durban

Enter text to search...

Functions: Work Orders, Work In Progress, Notes, Assignments, Hold History, Pending History, On Site Info, For Contact

Count: 381

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine 580-19			
CH0000042	Samantbas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machine repair needed			
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	13:34:37	1 black toner for collect			
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jan.	14:13:49	Service required			
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery			
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required			
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure - COO			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha.	11:39:50	Deliver full set of toners			
CH0000058	Samantbas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har.	11:52:36	New machine			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har.	12:12:15	Machine Rental Deal			
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har.	12:26:58	Machine service required			
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo	11:23:30	Test BPO fix train			
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo	13:16:20	Toner for delivery			
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo	13:45:10	Service machine	SERV	Service	
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlem Jess.	11:04:32	Machine service required	SERV	Service	
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlem Jess.	11:41:18	test	NDS	New Deal Sale	
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlem Jess.	12:07:35	Service and toner required	SERV	Service	
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan.	16:17:59	Magenta toner required	TON	Toner Required	
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan.	16:21:59	CO789	NDS	New Deal Sale	
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jan.	15:07:45	shade unit for rental on current contract	NDR	New Deal Rental	
CH0000099	Bellus Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service	
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su.	09:52:00	Test machine	REP	Repair	
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	09:37:02	test	REP	Repair	
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	10:09:53	test	SERV	Service	
CH0000135	Mary Conary	27/05/2015	Awaiting Ac.	Carolina Su.	08:45:05	New customer contact call	DR	Select Call Type	

User : Bianca | 09/01/2024 | Version : 2.5.1.4 | v2514 Example Company

## 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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