

SERVICE

CALL ADMINISTRATION – ASSIGN A CALL

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

By assigning a Technician, Driver, or Responsible Person to a call, identifies who will be working on the call.

If Tech Connect is not used, then the call will move to the **In Progress** status. The call centre person will **accept the call on the Technician's behalf**.



If the technician uses Tech Connect - **he will accept the call on his device**, and only then will the call move to **In Progress**.

Refer to the **Call State** column on the Call Listing screen, to see if the call has been assigned or not.

The call can be in either:

- status **New** with Call State **Unassigned**
- status **New** with Call State **Awaiting Acceptance**

Work and resources can be logged as the technician performs the required job. He may need to **Reject the Assignment** if the client is not available or out of his logistical route.

A technician can only be assigned to one call at a time. He will **End Work** then **Accept** the next call. Each additional assignment will follow a **prior resolution**.

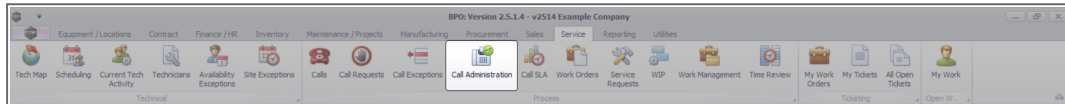
The call can be re-assigned.

¹BPO2 v2.5.1.3 or higher.

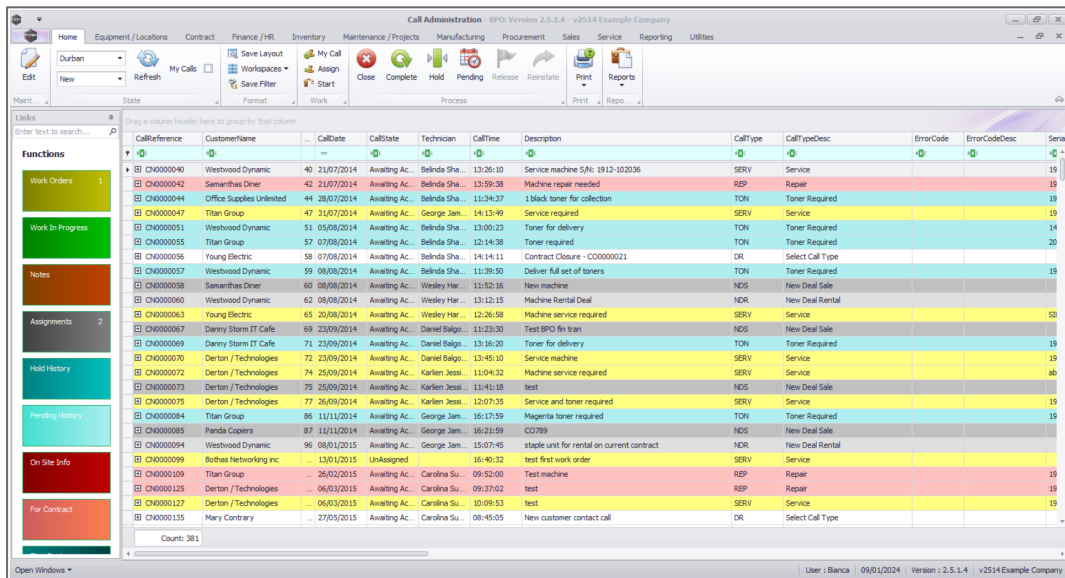
Set up the employee as a technician, if the person you wish to assign to a call, is an employee, but does not display on the list when searching in the assign screen.

THE CALL ADMINISTRATION SCREEN

Ribbon Select Service > Call Administration



- The **Call Administration** screen will be displayed.



- Click on the row selector of the call you would like to work with.

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

Edit Durban Refresh My Calls Workspaces Assign Start Close Complete Hold Pending Release Revertable Print Reports

Main State Format Work Process Print Reps

1 filter
text to search...

Functions

- Work Orders 2
- Work In Progress
- Notes
- Assignments 1
- Hold History
- Pending History
- On Site Info
- Far Contact

CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Ser
[C] CHN000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine S/N: 1912-102036	SRV	Service			19
[C] CHN000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machne repair needed	REP	Repair			19
[C] CHN000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	11:34:37	1 black toner for collection	TON	Toner Required			19
[C] CHN000047	Tian Group	47 21/07/2014	Awaiting Ac.	George Jam.	14:13:49	Service required	SRV	Service			19
[C] CHN000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery	TON	Toner Required			20
[C] CHN000055	Tian Group	55 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required	TON	Toner Required			14
[C] CHN000056	Young Electric	56 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure - C00000021	DR	Select Call Type			19
[C] CHN000057	Westwood Dynamic	59 06/09/2014	Awaiting Ac.	Belinda Sha.	11:30:50	Deliver full set of toners	TON	Toner Required			19
[C] CHN000058	Samanthas Diner	60 08/09/2014	Awaiting Ac.	Wesley Har.	11:52:36	New machine	NOS	New Deal Sale			19
[C] CHN000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har.	13:12:15	Machine Rental deal	NDR	New Deal Rental			19
[C] CHN000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har.	12:26:58	Machine service required	SRV	Service			03
[C] CHN000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo.	11:23:30	Test BPO fir tran	NOS	New Deal Sale			19
[C] CHN000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:16:20	Toner for delivery	TON	Toner Required			19
[C] CHN000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Danton J.	13:45:10	Service machine	SRV	Service			19
[C] CHN000072	Derton / Technologies	74 23/09/2014	Awaiting Ac.	Karlén Jessi.	11:04:32	Machine service required	SRV	Service			19
[C] CHN000073	Derton / Technologies	75 23/09/2014	Awaiting Ac.	Karlén Jessi.	11:41:18	test	NOS	New Deal Sale			19
[C] CHN000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlén Jessi.	12:07:35	Service and toner required	SRV	Service			19
[C] CHN000084	Tian Group	86 11/11/2014	Awaiting Ac.	George Jam.	16:17:59	Hogarta toner required	TON	Toner Required			19
[C] CHN000085	Penda Copiers	87 11/11/2014	Awaiting Ac.	George Jam.	16:21:59	C0789	NOS	New Deal Sale			19
[C] CHN000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			19
[C] CHN000099	Bethsa Networking Inc	110/12/015	Unassigned		16:40:32	test first work order	SRV	Service			19
[C] CHN000109	Tian Group	26/02/2015	Awaiting Ac.	Carolina Su.	09:52:00	Test machine	REP	Repair			19
[C] CHN000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	09:37:02	test	REP	Repair			19
[C] CHN000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su.	10:09:53	test	SRV	Service			19
[C] CHN000135	Mary Conraby	27/05/2015	Awaiting Ac.	Carolina Su.	08:45:05	New customer contact call	DR	Select Call Type			19

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ASSIGN THE CALL

- Click on the **Assign** button.

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 Assign Close Complete Hold Pending Release Reorder Print Reports

Save Layout Workspaces Save Filter Format Work Process

Order text to search...

Functions

- Work Orders
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info
- For Contract

CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallPrioDesc	ErrorCode	ErrorCodeDesc	Service
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:16:20	Toner for delivery	TON	Toner Required			Service
CH0000070	Dierlert / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:45:10	Service machine	SERV	Service			Service
CH0000072	Dierlert / Technologies	74 25/09/2014	Awaiting Ac.	Karlien Jessi.	11:04:32	Machine service required	SERV	Service			ab
CH0000075	Dierlert / Technologies	77 26/09/2014	Awaiting Ac.	Karlien Jessi.	12:07:35	Service and toner required	SERV	Service			Service
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan.	16:17:59	Magenta toner required	TON	Toner Required			Service
CH0000099	Bothes Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			Service
CH0000109	Hsiao Group	26/02/2015	Awaiting Ac.	Caroline Su.	08:52:00	Test machine	RSP	Rspwr			Rspwr
CH0000125	Dierlert / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	09:37:02	test	RSP	Rspwr			Rspwr
CH0000127	Dierlert / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	10:09:53	test	SERV	Service			Service
CH0000135	Mary Conraby	27/05/2015	Awaiting Ac.	Caroline Su.	08:45:05	New customer contact call	DR	Select Call Type			Service
CH0000194	Hack PC IT Shop	22/10/2015	Awaiting Ac.	Karlien Jessi.	13:56:55	Contract Closure - C00000028	DR	Select Call Type			Service
CH0000196	Green Tea Supplies	23/10/2015	Awaiting Ac.	Belinda Shu.	09:10:06	Contract Closure - C00000030	DR	Select Call Type			Service
CH0000198	Just In Time	29/10/2015	Unassigned		13:34:41	test	INVT	Installation			Service
CH0000199	Duff Primary	29/10/2015	Awaiting Ac.	Belinda Shu.	14:26:35	2	NOS	New Deal Sale			Service
CH0000209	Young Electric	13/11/2015	Awaiting Ac.	Wesley Row.	14:09:39	reject call test	NOS	New Deal Sale			Service
CH0000215	Green Tea Supplies	19/11/2015	Awaiting Ac.	Belinda Shu.	08:42:50	test	IT	IT Requirement			Service
CH0000217	Dierlert / Technologies	17/11/2015	Awaiting Ac.		13:55:04	Contract Closure - C00000009	DR	Select Call Type			Service
CH0000230	Young Electric	17/11/2015	Awaiting Ac.	Belinda Shu.	17:00:07	Check up Joojo@90@Chow@P@t@ter@Test	RSP	Rspwr			Rspwr
CH0000230	North West Branch	11/01/2016	Awaiting Ac.	Belinda Shu.	11:40:50	test new call from web connect	IT	IT Requirement			Service
CH0000239	North West Branch	15/01/2016	Awaiting Ac.	Belinda Shu.	12:10:05	test renamed customer connect	NOR	New Deal Rental			Service
CH0000292	Bothes Networking inc	24/03/2016	Rejected by	Bianca Du T.	13:32:32	Return all from short term contract STC0000009.	DR	Select Call Type			Service
CH0000300	Dancing Shoes	29/03/2016	Ended Work	Bianca Du T.	16:28:15	test	NOS	New Deal Sale			Service
CH0000304	Tinas Coffee Shop	12/04/2016	Awaiting Ac.	Belinda Shu.	16:51:44	Return all from short term contract STC0000012.	DR	Select Call Type			Service
CH0000305	Tinas Coffee Shop	12/04/2016	Rejected by	Bianca Du T.	16:51:45	Return all from short term contract STC0000012.	DR	Select Call Type			Service
CH0000324	Westwood Dynamic	08/06/2016	Awaiting Ac.	Belinda Shu.	09:12:31	Machine keeps switching on and off	RSP	Repar			Service

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 For a detailed handling of this topic refer to Calls - Assignments

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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