

SERVICE

CALL SLA MANAGEMENT – ASSIGN A CALL

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.

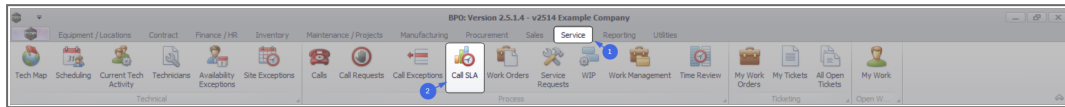
A technician can only be assigned to one call at a time. He will **End Work** then **Accept** the next call. Each additional assignment will follow a **prior resolution**.

The call can be re-assigned.

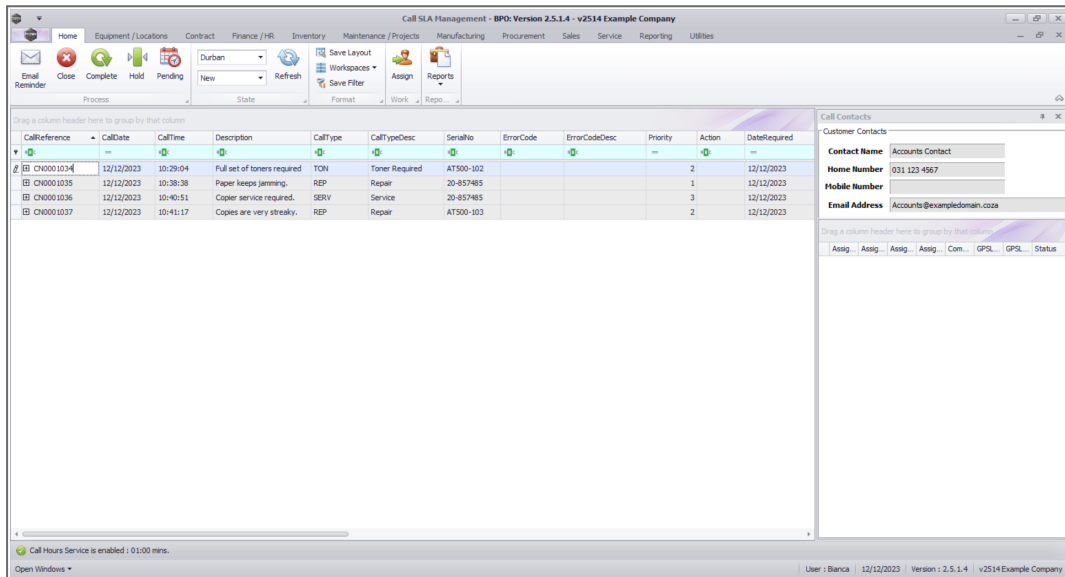
Set up the employee as a technician, if the person you wish to assign to a call, is an employee, but does not display on the list when searching in the assign screen.

THE CALL SLA MANAGEMENT LISTING SCREEN

Ribbon Select **Service** > **Call SLA**

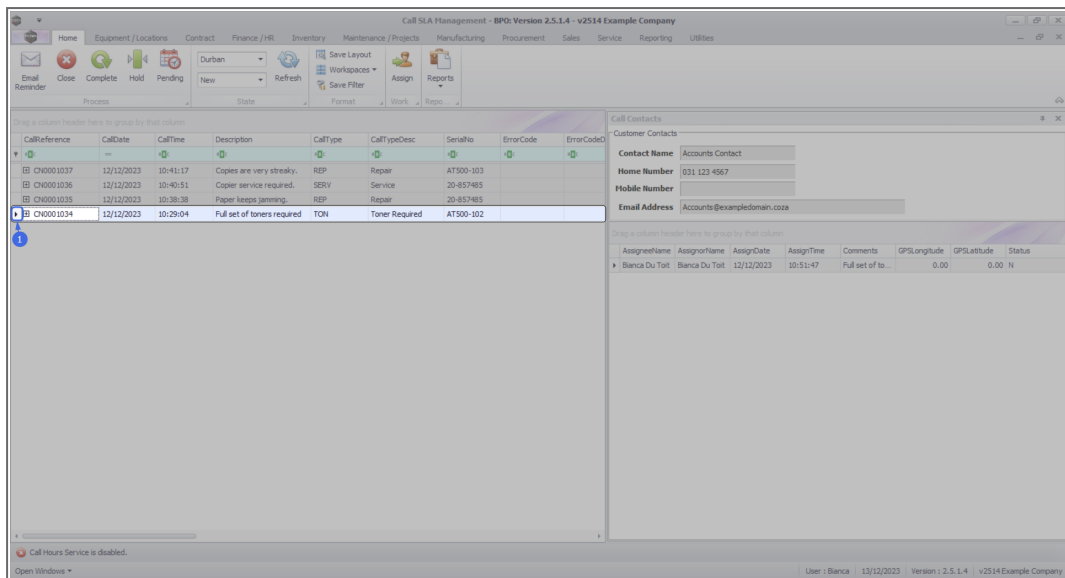


- The **Call SLA Management** Listing screen will display.

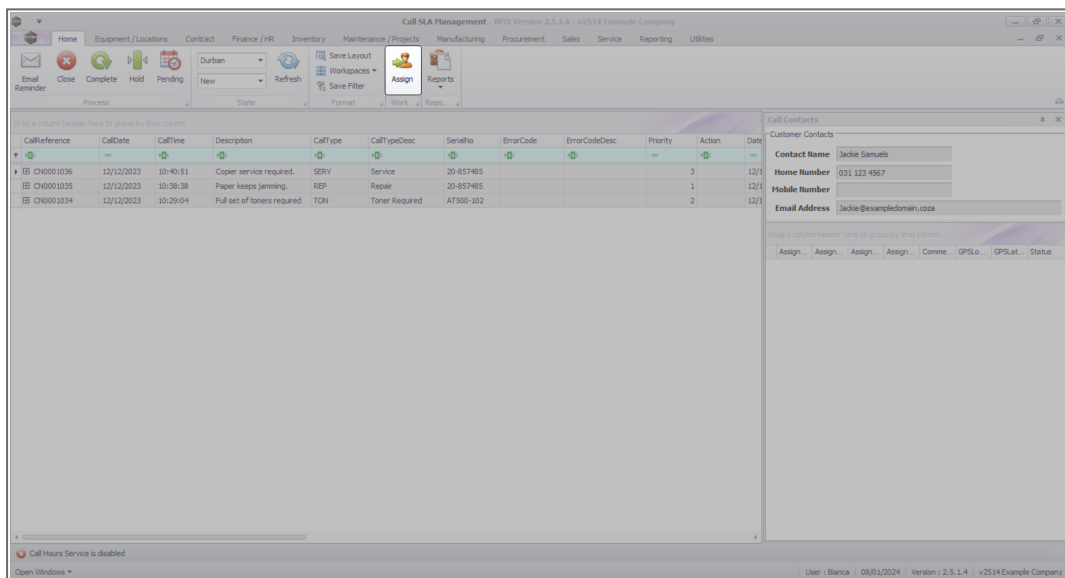


ASSIGN A CALL

- Click on the row selector in front of the Call.

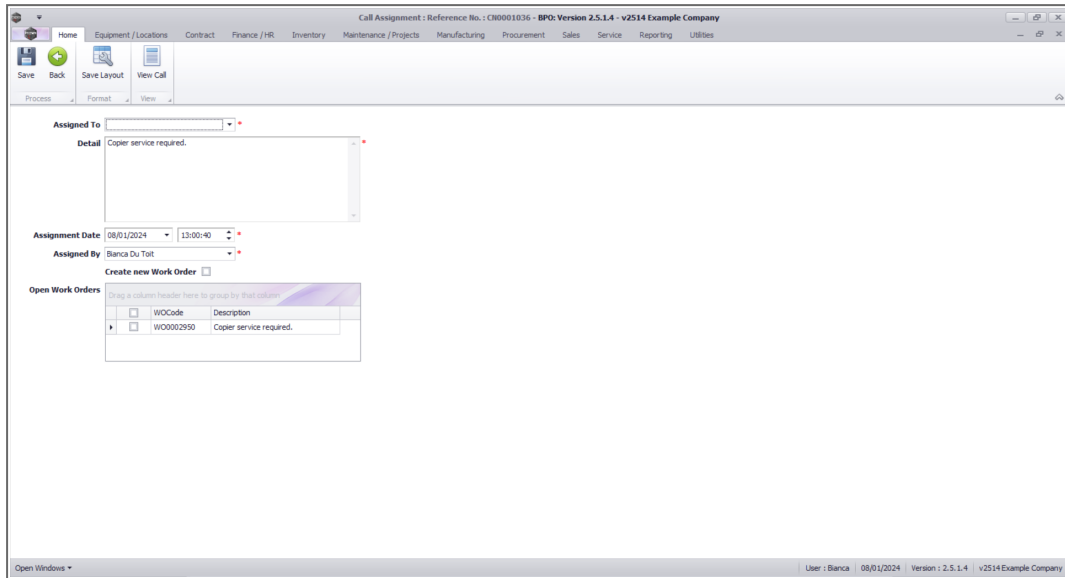


- Click on the **Assign** button.



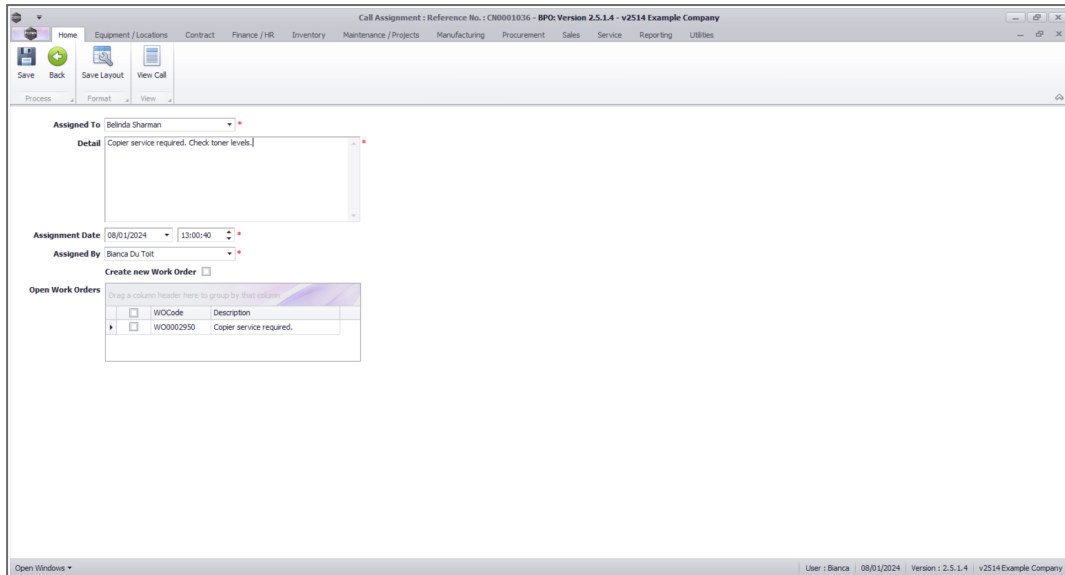
- The **Call Assignment** maintain screen will come up, with the following fields populated:
 - Detail:** The Call Description.
 - Assignment Date and Time:** 2 days from current date and time.

- **Assigned By:** The employee who is currently logged on.



The screenshot shows the 'Call Assignment' window in the CO3 system. The window title is 'Call Assignment : Reference No.: CH0001036 - BPO: Version 2.5.1.4 - v2514 Example Company'. The interface includes a top menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Save, Back, Save Layout, and View Call. The main area is divided into sections: 'Assigned To' (a dropdown menu), 'Detail' (a text area containing 'Copier service required.'), 'Assignment Date' (08/01/2024), 'Assigned By' (Blanca Du Toit), and 'Open Work Orders' (a table with columns WOCODE and Description, showing a single entry 'WO0002950 Copier service required.'). A 'Create new Work Order' checkbox is also present. The bottom status bar shows 'User : Blanca | 08/01/2024 | Version : 2.5.1.4 | v2514 Example Company'.

- Complete the details as follows:
 - **Assigned To:** Select the employee who will be doing this work.
 - **Detail:** This is pre-populated with the call description, but the detail can be added to for further instruction to the technician.

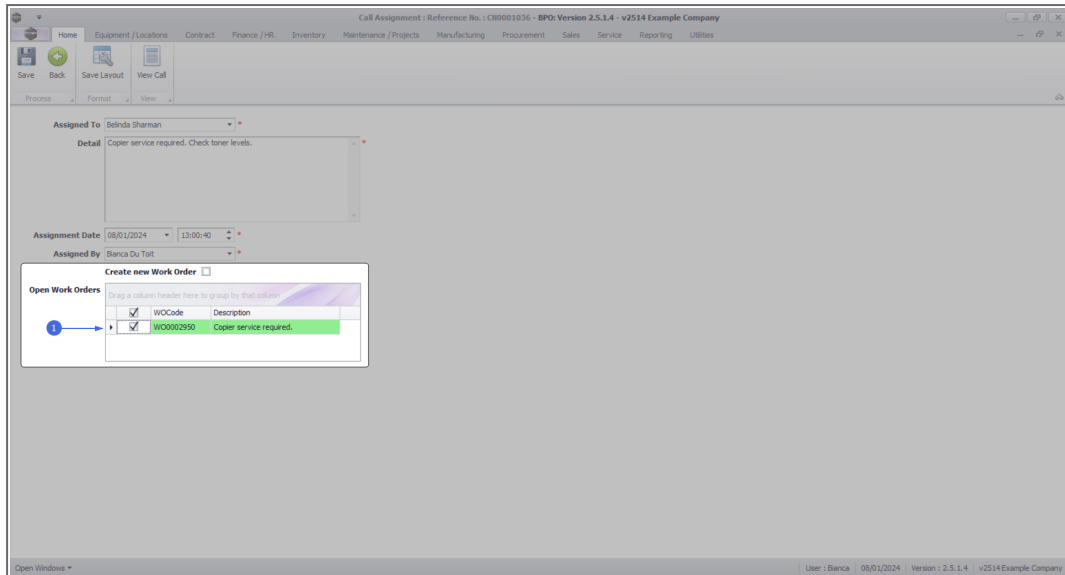


WORK ORDER ASSIGNMENT LINK

- Next you will select to either link the assignment to the existing open work order or create a new work order. Do not select both flags.

Link to Open Work Order

- For new calls, you will be linking the assignment to the existing **Open Work Order**.
- Click on the check box in front of the relevant **Open Work Order**.



Call Assignment : Reference No. : CH0001036 - BPO: Version 2.5.1.4 - v2514 Example Company

Assigned To: Belinda Sharnan

Detail: Copier service required. Check toner levels.

Assignment Date: 08/01/2024 13:00:40

Assigned By: Bianca Du Toit

Create new Work Order ☐

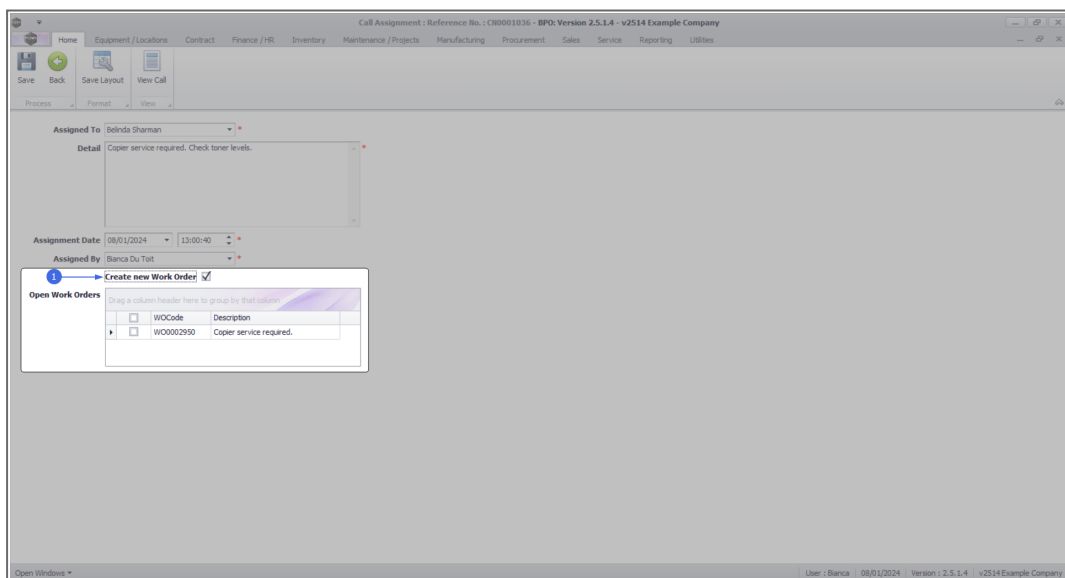
Open Work Orders

WCode	Description
WO0002950	Copier service required.

User : Bianca | 08/01/2024 | Version : 2.5.1.4 | v2514 Example Company

Create New Work Order

- This feature is used if the technician needs to follow up on the same call, but for a different task, for instance when a call has been re-assigned. The assignment detail needs to be changed accordingly.
- Click on the **Create new Work Order** check box.



Call Assignment : Reference No. : CH0001036 - BPO: Version 2.5.1.4 - v2514 Example Company

Assigned To: Belinda Sharnan

Detail: Copier service required. Check toner levels.

Assignment Date: 08/01/2024 13:00:40

Assigned By: Bianca Du Toit

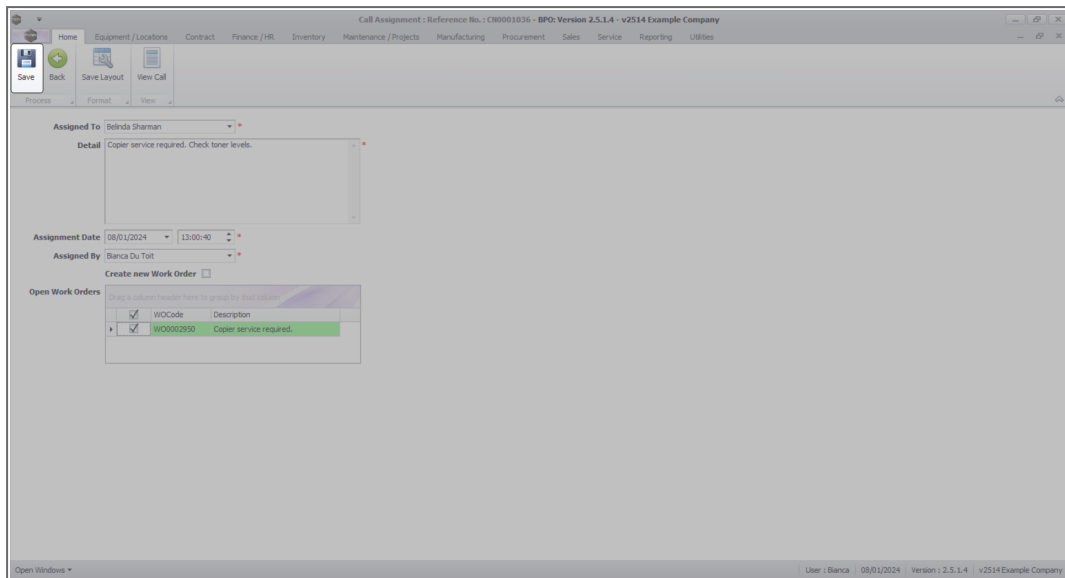
Create new Work Order ☒

Open Work Orders

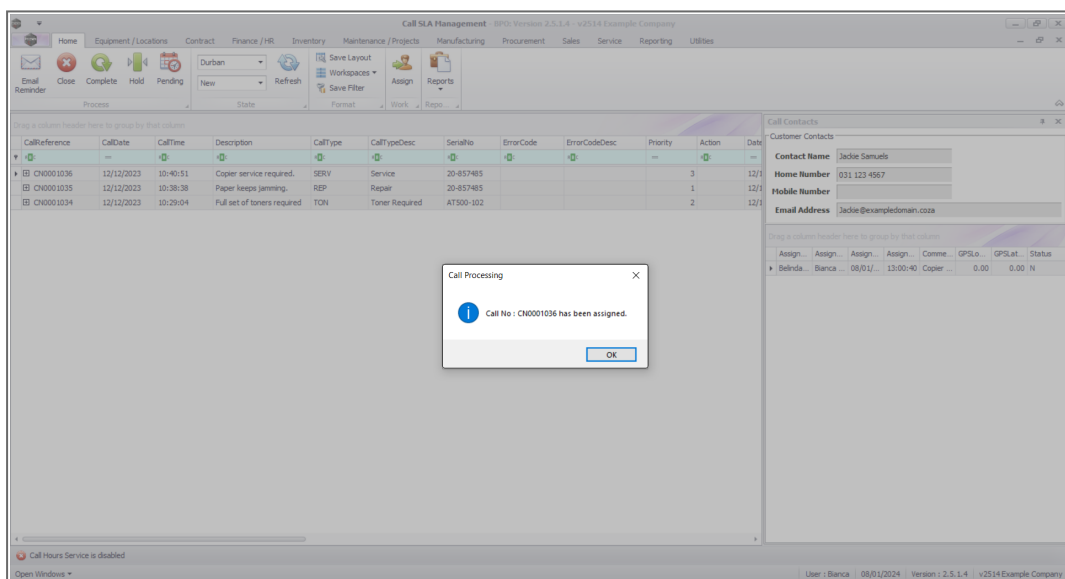
WCode	Description
WO0002950	Copier service required.

User : Bianca | 08/01/2024 | Version : 2.5.1.4 | v2514 Example Company

- Click on the **Save** button.



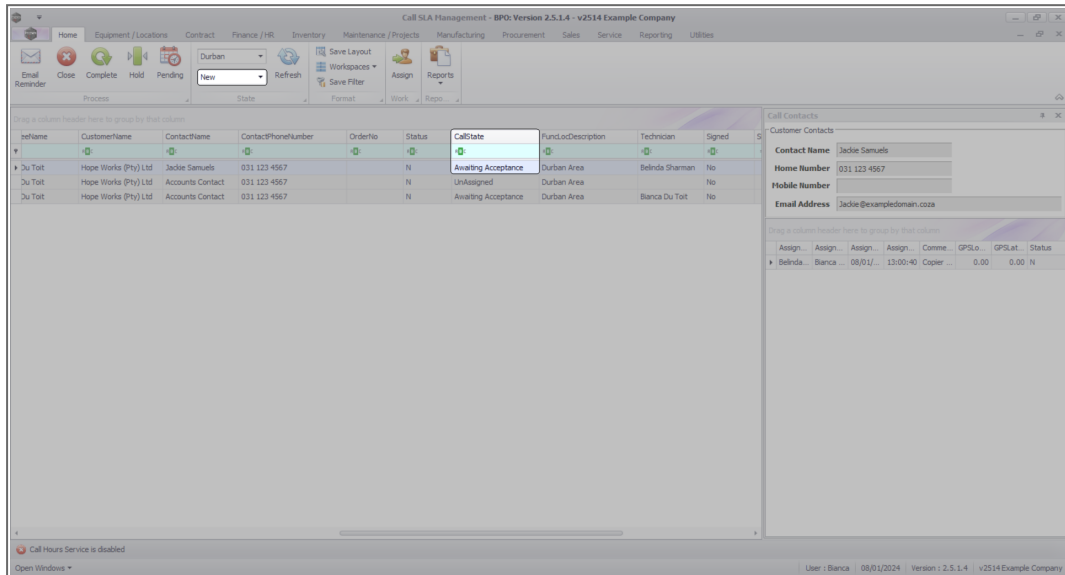
- A message box will come up, noting:
 - Call No: [call ref no] has been assigned.**



- If using **Tech Connect** (**Auto Accept Call Assignment** company configuration flag set to **No**), the call will remain in status **New**, with the updated call State: **Awaiting Acceptance**. The call will display

on the Technician's call list on Tech Connect, where it can be accepted or rejected.

- Otherwise, the call will automatically be accepted and move to the **In Progress** status.



Related Topics

- [Service - Introduction to Call SLA Management](#)
- [Service - Call SLA Management - Email Reminder](#)
- [Service - Call SLA Management - Close Call](#)
- [Service - Call SLA Management - Complete Call](#)
- [Service - Call SLA Management - Hold a Call](#)
- [Service - Call SLA Management - Pend a Call](#)
- [Service - Call SLA Management - Assign a Call](#)
- [Service - Call SLA Management - Call Hours Service Status](#)
- [Introduction to Call Hours Service](#)

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