

SERVICE

CALLS - PLACE ON HOLD

Placing a call on **Hold** means that work will be stopped to resolve a **customer** issue, e.g.no one is available at Customer site to allow a technician access to a location, or the Customer is awaiting approval from their finance department before a new part requested can be fitted. The <u>SLA Monitor</u> will "pause" until the call has been Released from Hold. Refer to Calls - Release a Call for information on how to release a call from hold.

A call can *manually* be placed on hold by the *Call Centre*.

Using **Tech Connect**, the technician selects <u>End Call</u> on his device, followed by the **Resolution Action** as **Unresolved (Client)**. The call will be placed on **Hold**.

Ribbon Access: Service > Calls



- 1. The *Call Listing* screen will be displayed.
- 2. Select the *Site* where the call has been logged.
 - The example has *Durban* selected.



- 3. Select the *Status* for the call.
 - The example has *In Progress* selected.

Note that the screen will always open in the **New** status of the **Site** that was <u>first</u> set up during your company configuration.

- 4. Click on the *row* of the *call* you wish to place on *hold*.
- 5. Click on *Hold*.



- 6. The *Call on Hold : [call ref. number]* screen will be displayed.
 - Hold Date: The field will display the current date and time.
 - Date: Type in or click on the down *arrow* to use the calendar function to select an alternative date.
 - **Time:** Type in or use the *arrow* indicators to select an alternative time.



• **Reason Code:** Click on the down *arrow* to select the relevant reason code from the *drop down list*.

Refer to Static Data - Call Hold Reason Codes to configure reason codes.

- Hold Reason: Type in detail as to the reason the call is placed on hold.
- Estimated Release Date: The estimated release date will auto populate with a system generated date, usually 2 days after the Hold Date.
 - **Date:** Type in or click on the down *arrow* to use the calendar function to select an estimated date that this call will be released from hold.
 - **Time:** Type in or click on the *arrow* indicators to select an estimate time for when this call will be released from hold.
- Employee: This field will populate with the name of the person currently logged onto the system. Click on the down *arrow* to select a different employee from the drop down list, if required.
- 7. When you have finished adding details to this screen, click on *Save*.



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- 8. You will return to the *Call Listing* screen.
- 9. When you receive the *Call Processing* message to confirm that;
 - Call No: [call ref. number] has been placed on hold.
- 10. Click on *OK*.



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11. The Call can <u>no longer</u> be viewed in the current list. Change the *Status* to *Hold*, to view the Call.

Note that the number of *In Progress* calls have reduced by *1*.



Calls - Place on Hold

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Related Topics

• Calls - Release a Call

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