

SERVICE

CALLS - PLACE ON HOLD

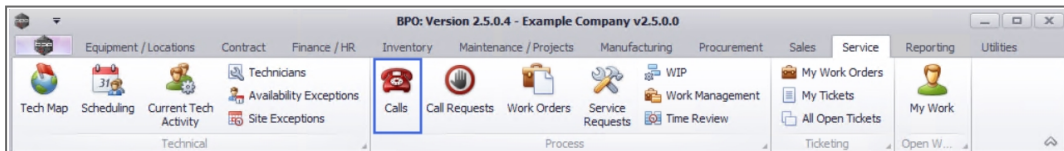
Placing a call on **Hold** means that work will be stopped to resolve a **customer** issue, e.g. no one is available at Customer site to allow a technician access to a location, or the Customer is awaiting approval from their finance department before a new part requested can be fitted. The [SLA Monitor](#) 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 [End Call](#) 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.

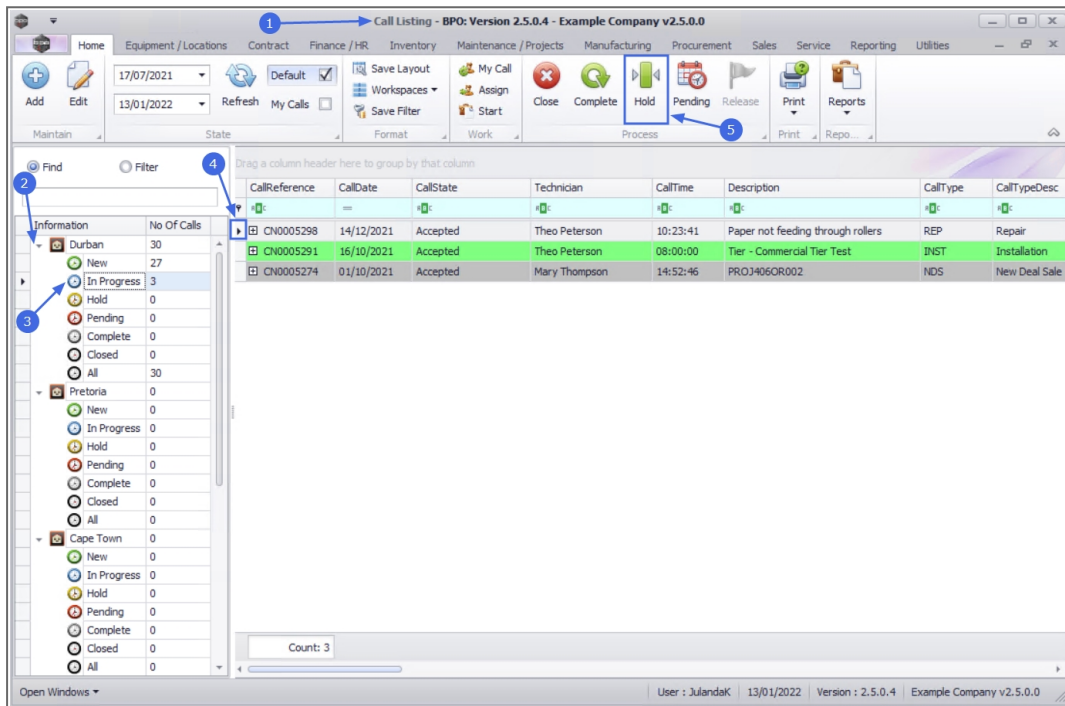
- The example has **In Progress** selected.



Note that the screen will always open in the **New** status of the **Site** that was first 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.

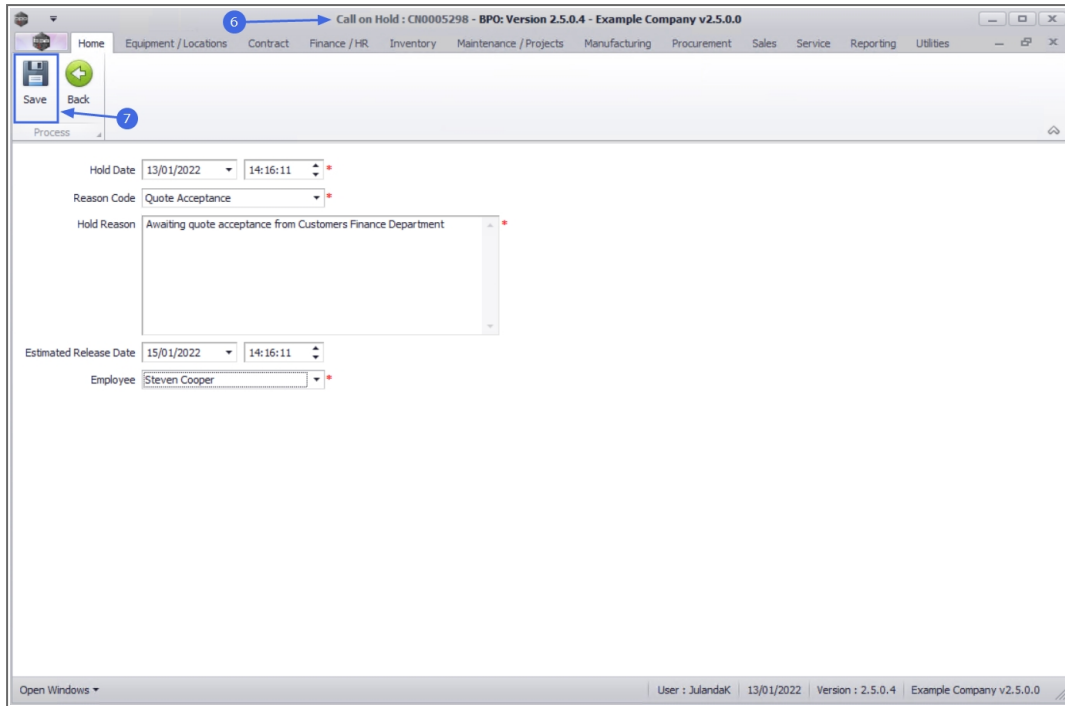
- **Reason Code:** Click on the down **arrow** to select the relevant reason code from the **drop down list**.



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**.



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**.

Call Listing - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005291	16/10/2021	Accepted	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
CN0005274	01/10/2021	Accepted	Mary Thompson	14:52:46	PROJ406OR002	NDS	New Deal Sale

Information

Information	No Of Calls
Durban	30
New	27
In Progress	2
Hold	1
Pending	0
Complete	0
Closed	0
All	30
Pretoria	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
Closed	0
All	0
Cape Town	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
Closed	0
All	0

Count: 2

User : JulandaK | 13/01/2022 | Version : 2.5.0.4 | Example Company v2.5.0.0

- The Call can no longer 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**.

The screenshot displays the 'Call Listing' window in the CO3 BPO software. The window title is 'Call Listing - BPO: Version 2.5.0.4 - Example Company v2.5.0.0'. The interface includes a top navigation bar with various modules like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with buttons for Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. A sidebar on the left shows a tree view of call statuses and locations. The main area contains a table of call records.

Information	No Of Calls
Durban	30
New	27
In Progress	2
Hold	1
Pending	0
Complete	0
Closed	0
All	30
Pretoria	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
Closed	0
All	0
Cape Town	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
Closed	0
All	0

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0005298	14/12/2021	Accepted	Theo Peterson	10:23:41	Paper not feeding through rollers	REP	Repair

Count: 1

Related Topics

- [Calls - Release a Call](#)

MNU.122.003