SERVICE

CALLS - 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**

A technician can only be assigned to one call at a time. He will **End Work** then **Accept** the next call.

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.

Ribbon Access: *Service > Calls*

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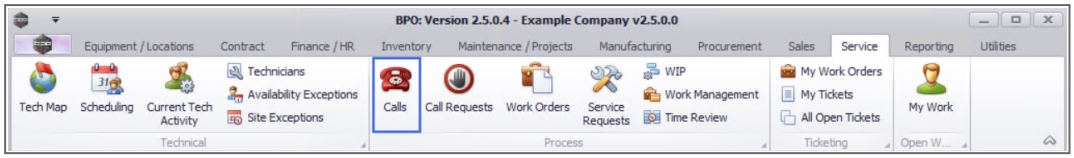
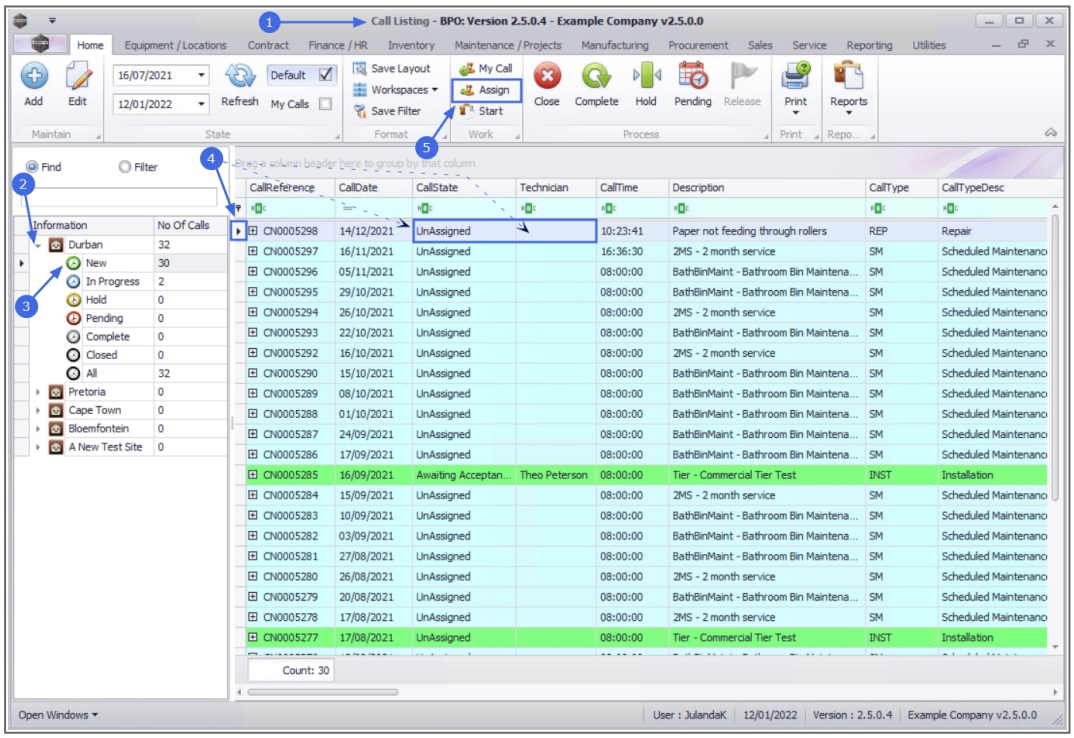


1. The ***Call Listing*** screen will be displayed.
2. Select the ***Site***.
    - The example has ***Durban*** selected
3. The ***Status*** must be set to ***New***.

> Note that only calls in the *New* status can be assigned.

4. Select the ***row*** of the ***call*** you wish to ***assign***.
    - Note the example:
        - Status **- New**
        - Call State **- Unassigned**
        - Technician **- not linked (blank)**
5. Click on ***Assign***.



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6. The ***Call Assignment: Reference No: [****call ref number****]*** screen will be displayed.
    - **Assigned To:** Click on the down ***arrow*** to select the employee from the menu.
    - **Assignment Detail:** This field will populate with the call reference description. Add the technician assignment details as required.
    - **Assignment Date:** The current date and time will display.
        - **Date:** Type in or click on the down ***arrow*** to use the calendar function to select an alternative date, if required.
        - **Time:** Type in or use the ***arrow*** indicators to select an alternative time, if required.
    - **Assigned By:** The person currently logged onto the system, and assigning the call, will display in this field. Click on the down ***arrow*** to select a different employee from the drop down list, if required.
    - **Create new Work Order:** Click on the check box if you need to create a ***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 details needs to be changed accordingly.

    - **Open Work Orders:** Click to select the Work Order Code to link the employee to the current open work order.
7. When you have finished adding details to this screen, click on ***Save***.

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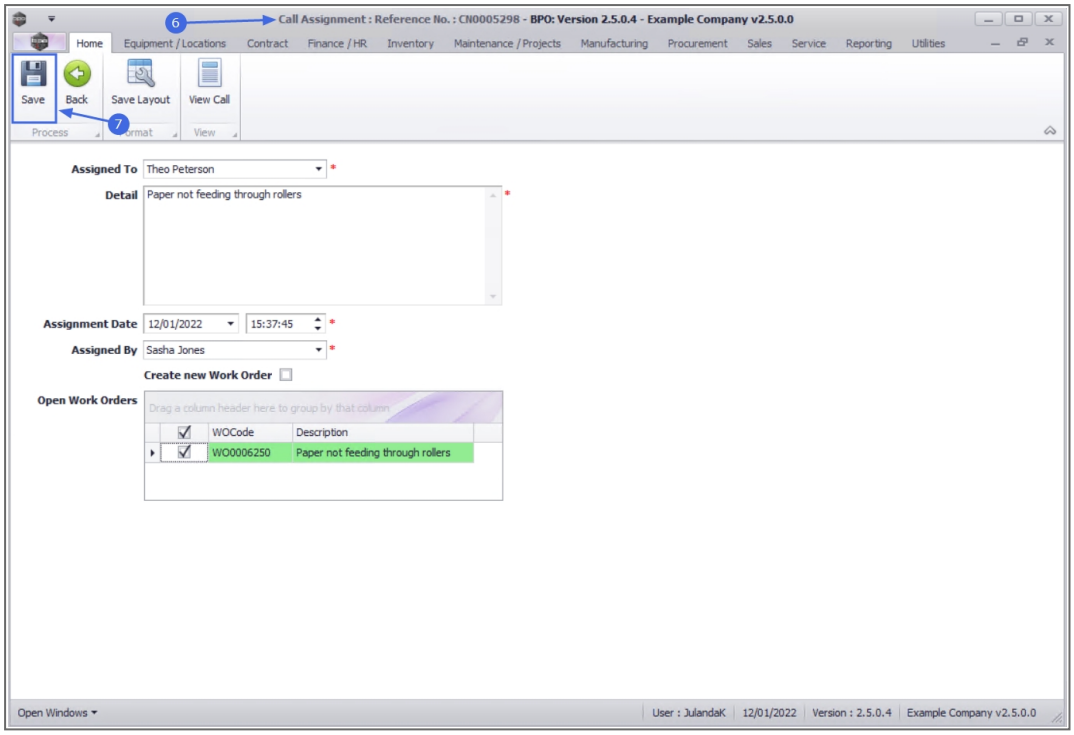

8. You will return to the ***Call Listing*** screen.
9. When you receive the ***Call Processing*** message to confirm;
    - ***Call No: [***call ref. number***] has been assigned.***
10. Click on ***OK***.

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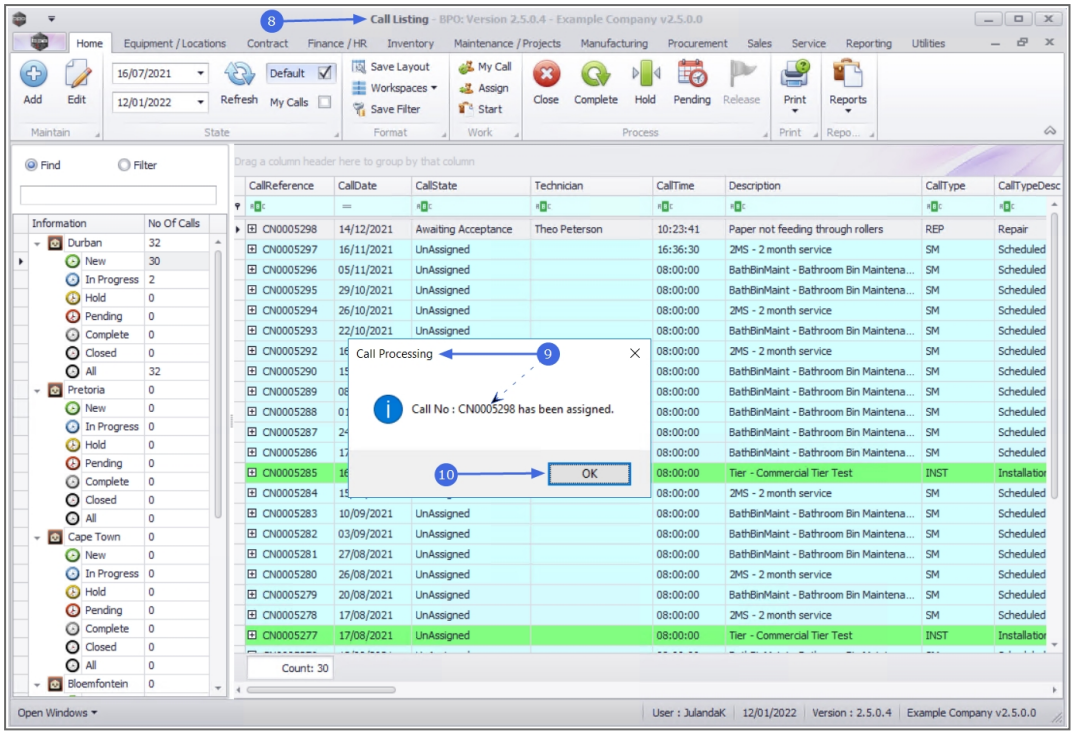

11. The call has now been assigned. Note the changes to the example;
    - the Status - Is set to **New** (as before)
    - the State - Is now **Awaiting Acceptance**
    - the Technician column - now has an Assigned **Technician Name**

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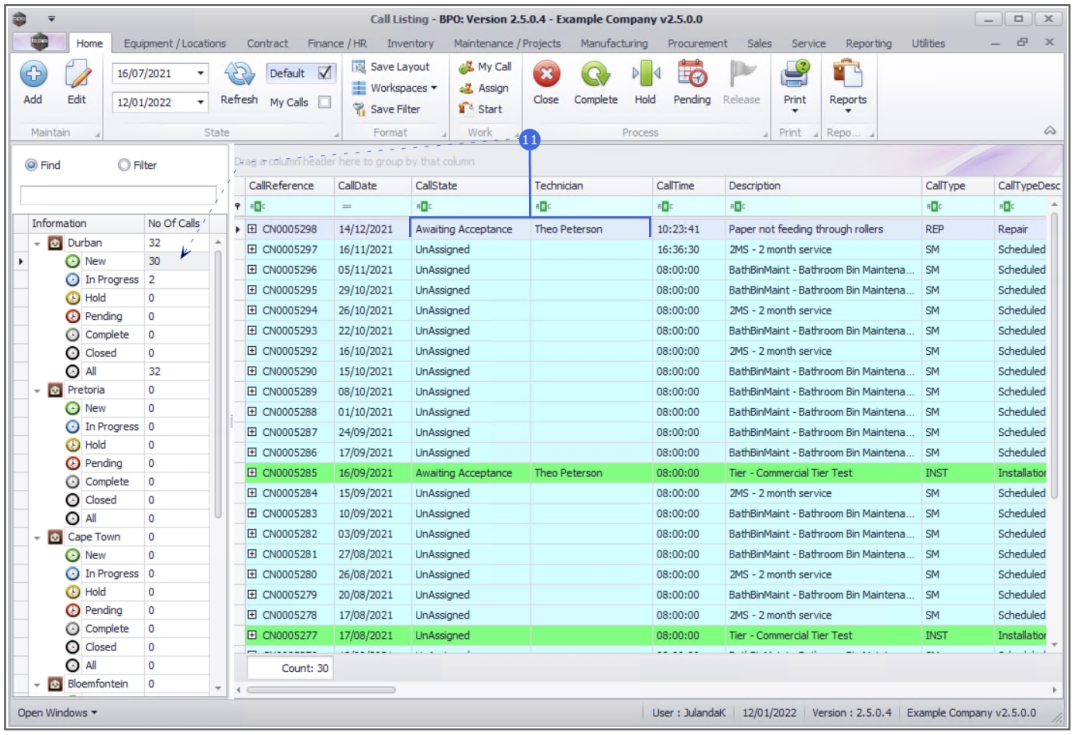

Reminder:

- If the technician uses Tech Connect - he will accept the call on his device, and only then will the call move to the ***In Progress*** status.
- If the technician does not use Tech Connect - the call centre person will accept the call on his behalf and it will move to the ***In Progress*** status.

Related Topics

- Service - Scheduling
- Calls - Assignments

MNU.122.005

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