

# **SERVICE**

# **CALLS - ASSIGNMENTS**

Ribbon Access: Service > Calls



- 1. The *Call Listing* screen will be displayed.
- 2. Select the *Site* and *Status*.
  - The example has *Durban* as the site and the status has been set to *New*.
- Click on the *row* of the *call* you wish to *Accept* on behalf of a technician.
- 4. Click on *Edit*.

Short cut Key: *Double click* in the *row* of the call you wish to edit.



	Ŧ		1	Call Li	sting - BPO: Version 2.	5.0.4 - Example Compa	any v2.5.0.0			_ <b>– x</b>
	Home Equi	pment / Location	is Contract Fina	ance / HR Inv	entory Maintenance /	Projects Manufacturin	ng Procureme	nt Sales Service Reporting	Utilities	_ & ×
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<b>F</b> =	Durban	30	E CN0005297	16/11/2021	UnAssigned		16:36:30	2MS - 2 month service	SM	Scheduled N
	O New	28		05/11/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
	In Progress	2		29/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
	Hold	0		26/10/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled N
	Complete	0		22/10/2021	UnAssigned	08:00:00		BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
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<b>,</b>	Pretoria	0	E CN0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
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+	A New Test Site	0	E CN0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
L :			E CN0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
			E CN0005284	15/09/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled N
			E CN0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
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			E CN0005281	27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
			E CN0005280	26/08/2021	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled N
			E CN0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled N
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- 5. The *Call maintenance: Call ref. [call ref. number]* screen will be displayed.
- 6. Click on the *Assignments* tile.

¢ <b>₹</b> 5		Call main	tenance	e : Call ref	CN0005298	- BPO: Version 2	.5.0.4 - Exan	nple Company	v2.5.0.0					
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Help v2.5.0.14 - Pg 2 - Printed: 25/06/2024



## FORCE ACCEPT



- 7. The *Assignment Listing for Call, Ref no: [call ref number]* screen will be displayed.
- 8. Click on the *row* of the *technician* you wish to *accept* the call for.
- 9. Click on *Force Accept*.
- 10. A *Delete Call Assignment* message box will display to confirm;
  - Are you sure you want to accept this call assignment?
- 11. Click on Yes.

• • •	7 Assi	gnment Listing for (	Call Ref no : CN00052	298 - BPO: Versi	on 2.5.0.4 - Ex	ample Compa	any v2.5.0	0.0					Ð
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Theo Peterson	Sasha Jones	12/01/2022	15:37:45	Paper not f	0.00	0.00	Ν						
		Delete Cal	Il Assignment  Are you sure you wa	nt to accept this	call assignmen	×							

12. Close the Assignment Listing for Call screen.



Home       Equipment / Locations       Contract       Finance / HR       Inventory       Maintenance / Projects       Manufacturing       Procurement       Sales       Service       Reporting       Utilities       —         Add       Delete       Force       Save Layout       Workspaces       Refresh	8
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Theo Peterson         Sasha Jones         12/01/2022         15:37:45         0.00         0.00         A	
Open Windows + Capture screenshot. User : Julandak 13/01/2022 Version : 2.5.0.4 Example Company v2.	.0 /

- 15. You will return to the *Call Listing* screen.
- 16. Change the *Status* to *In Progress*, to view the call.

Note that the *Call State* has changed to *Accepte* 

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		15	Call L	isting - BPO: Version 2.	5.0.4 - Example Comp	any v2.5.0.0			
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Information	No Of Calls	EL CN0005298	14/12/2021	Accepted	Theo Peterson	10-23-41	Paper pot feeding through rollers	DED	Penair
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#### **ASSIGN CALL ASSIGNMENT**

- 1. From the *Assignment Listing for Call Ref no : [call ref. number]* screen.
- 2. Click on *Add*.





- 3. "The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 3
- 4. Complete the assignment screen and click on *Save*.

	-	Ca	II Assignment :	Reference N	o. : CN0005292 - BPO: Ve	ersion 2.5.0.8 - Ex	cample Compa	ny v2.5.0	.8				
Home Equ	ipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	e x
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#### **REJECT CALL ASSIGNMENT**

- 1. From the Assignment Listing for Call Ref no : [call ref number] screen,
- 2. Click on the *row* of the assignment you wish to remove.
- 3. Click on *Delete*.
- 4. When you receive the *Delete Call Assignment* message to confirm;
  - Are you sure you want to reject this call assignment?
- 5. Click on Yes.

₹ 1 Assignm	nent Listing for C	all Ref no : CN0005293	2 - BPO: Versio	n 2.5.0.8 - Exa	ample Compa	my v2.5.0.8				x
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en Windows 🔻				Us	er : JulandaK	10/05/2022	Version : 2.5.0.8	Example Com	oany v2.5.0.	8 //.

- 6. Next you will receive the *Rejection Comments* screen.
- 7. Click in the comments section and type the rejection comments.
- 8. Click on *Save*.



-	,	Ass	ignment Listing f	or Call Ref no : CN00052	92 - BPO: Versi	on 2.5.0.8 - Ex	ample Compa	my v2.5.0	.8			_	x
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- 9. The Status has been updated to *R* Rejected.
- 10. *Close* the screen to return to the Call maintenance screen

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