

We are currently updating our site; thank you for your patience.

SERVICE

CALLS - ASSIGN A CALL

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

By assigning a Technician, Driver, or Responsible Person to a call, identifies who will be working on the call.

If Tech Connect is <u>not</u> 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 <u>Reject the Assignment</u> if the client is not available or out of his logistical route.

¹BPO2 v2.5.1.3 or higher



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 <u>prior resolution</u>.

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 Select Service > Calls



• The **Call Listing** screen will be displayed.

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		Top Vehicle Hire Apple Juice Inc	25/10/2022	Awaiting Acceptance	Daniel balgowen	14:09:17	Loan machine for temporary high volume printing requirement Contract Closure - CO0000054	SERV	Service Select Cal Type			TOP 12340LD		
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		Young Bectric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
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O New		Young Electric	19/11/2019	Availing Acceptance		11:24:39	Test with site manager email entered	ADM	Administration			107		
		Hope Works (Pty) Ltd	18/11/2019	Anaiting Acceptance		16:30:20	test another call email	ADM	Administration			095011015		
		Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
		Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
		Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
		Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
		Green Tea Supplies	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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O Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
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	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2M5 - 2 month service	SM	Scheduled Maintenance			147807		
	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	SathSinNaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
		Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST.	Installation				Forest Hills Centre	
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		Westwood Dynamic		UnAssigned		08:00:00	SathSinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
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		Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
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- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.



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rmation	EE CN0001003	Young Bectric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
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Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15		DR	Select Call Type					
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O New	E CN0000987	Young Bectric	06/06/2022			05:00:00		UPG	Upprade			sin123		
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(b) Hold	E CN0000985	Hope Works (Ptv) Ltd	10/06/2022			16:09:13		LIPG	Upprade			20-98765		
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	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
	Count: 386												Personal Product Illinoid	

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

• Select the **Call** you wish to work with.

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() Hold	■ CN0000986	Young Electric		UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
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O New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
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() Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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5 tiloemfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	524	Scheduled Maintenance			NEW 1234		
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In Progress	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
() Hold	E CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathSinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending Complete	E CN0000964	Hack PC - IT Shop		UnAssigned		03:00:00	2MS - 2 month service	514	Scheduled Maintenance			147807		
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	Count: 388							100					Phone Produce Alberta	

• Click on the **Assign** button.





- 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 detail 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.
- When you have finished adding details to this screen, click on

Save.

\$ •	Call Assignment : Reference No. : CN0001033 - BPO: Version 2.5.1.4 - v2514 Example Company	- @ x
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	Create new Work Order	
Open Work Orders	Drag a column header here to group by that column	
	W WOCode Description	
	WO0002947 Test Quote Add Attachment to email	
Open Windows 🕶	User : Banca 22,01/2024 Version : 2.5.1.4 v251	Example Company

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



Calls - Assign a Call

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Home	Equipment / Locations	Contract Fin	ance / HR Inventory	Maintenance / Proj	ects Manufi	acturing Pr	ocurement	Sales Service R	eporting Utilities				- 8
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- 🖸 Cape Town	n		Dancing Shoes	22/08/2023	UnAssign				00001	DR.	Select Call Type		
New		⊞ CN0001009	Young Electric	22/08/2023	UnAssigned		11:27:49	Contract Closure - COO		DR	Select Call Type		
🕑 In Prog	ress	E CN0001008	Office Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - COO	0000006	DR.	Select Call Type		
🕑 Hold		CN0001007	Apple Juice Inc	25/07/2023	UnAssigned		10:18:33	Machine inspection req	uired	INSP	Inspection		
Pendin			Hope Works (Pty) Ltd	07/06/2023	Awaiting Ac	Bianca Du T	11:21:29	Machine repair required	i i	PR	Parts Requirement	SERV	Services
O Comple	zte		Hope Works (Pty) Ltd	07/06/2023	UnAssigned		10:14:52	Walls require repainting	2	SM	Scheduled Maintenance	SERV	Services
All O			Young Electric	13/12/2022	Awaiting Ac	Arin Milton	10:09:10	Test account balances		DR.	Select Call Type		
Bloemfonte New	en		Samanthas Diner	12/12/2022	Awaiting Ac	Mary Thom	16:18:30	Test call for account ba	alances manual.	DR	Select Call Type		
In Proc	VARA		Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part to	vice receive with different batch num	PR	Parts Requirement		
() Hold	J1 C50	⊞ CN0000996	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract		NDR	New Deal Rental		
Pendin	0		Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - COO	0000054	ADM	Administration		
Comple		E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse	hours check	DR	Select Call Type		
O AI		Count: 349											

- 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

Ψ				Call Listing - BPO:	Version 2.5.1.4 - v2514 Example Comp	any			- 2
Home Equipment / Location		ance / HR Inventory	Maintenance / Proje	cts Manufacturing	Procurement Sales Service	Reporting Utilities			- 8
dd Edit My Calls M	Save Layout Workspaces * Save Filter Format	My Call Assign Start Work	omplete Hold P	ending Release Print	Reports				
Find O Filter									
	CalReference	CustomerName	CalDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
	Y (D)	-O:		10:	* 0 ¢	100	-0:	10:	(0)
Information	E CN0001036	Hope Works (Pty) Ltd		Awaiting Acceptance	Belinda Sharman	10:40:51	Copier service required.	SERV	Service
🗸 🔯 Durban	E CN0001035	Hope Works (Pty) Ltd		Awaiting Acceptance	Bianca Du Toit	10:38:38	Paper keeps jamming,	REP	Repair
New	E CN0001034	Hope Works (Pty) Ltd		Awaiting Acceptance	Bianca Du Tolt	10:29:04	Full set of toners required	TON	Toner Required
In Progress	E CN0001033	Young Electric	05/12/2023	Awaiting Acceptance	David Grav	15:42:01	Test Quote Add Attachment to email	NDS	New Deal Sale
() Hold	E CN0001032	Young Electric	02/10/2023	UnAssigned		12:35:12	Test credit note on work order	MN	Manufacturing
Pending Complete	E CN0001024	Hope Works (Pty) Ltd	12/09/2023	UnAssigned		09:23:50	Contract for Expiry Test	NDR	New Deal Rental
O Al	E CN0001023	Derton / Technologies	08/09/2023	UnAssigned		10:52:25	Open warranty claims have not been processed.	INSP	Inspection
- Pretoria	E CN0001022	Derton / Technologies	08/09/2023	UnAssigned		10:44:45	Meters attached with no readings captured	INST	Installation
O New	E CN0001017	Derton / Technologies		UnAssigned		16:43:14	Call Exceptions - to correct but not flag.	INST	Installation
 In Progress 	E CN0001015	Hope Works (Ptv) Ltd		Awaiting Acceptance	Bianca Du Toit	15:56:53	Test call sla functionality	SERV	Service
Hold	E CN0001014	Apple Juice Inc	22/08/2023	UnAssigned		11:30:52	Contract Closure - CO0000086	TR	Training
Pending	E CN0001012	Panda Copiers	22/08/2023	UnAssigned		11:28:32	Contract Closure - CO0000041	DR	Select Call Type
Complete	E CN0001011	Young Electric	22/08/2023	UnAssigned		11:28:26	Contract Closure - CO0000031	DR	Select Call Type
All	E CN0001010	Dancing Shoes	22/08/2023	UnAssigned		11:28:18	Contract Closure - PC0000001	DR	Select Call Type
- Cape Town	E CN0001009	Young Electric	22/08/2023	UnAssigned		11:27:49	Contract Closure - CO000008	DR	Select Call Type
New In Progress	E CN0001008	Office Supplies Unlimited	22/08/2023	UnAssigned		11:27:30	Contract Closure - CO0000006	DR	Select Call Type
Hold	CN0001007	Apple Juice Inc	25/07/2023	UnAssigned		10:18:33	Machine inspection required	INSP	Inspection
Pending	E CN0001006	Hope Works (Ptv) Ltd	07/06/2023	Awaiting Acceptance	Bianca Du Toit	11:21:29	Machine repair required	PR	Parts Requirement
Complete	E CN0001005	Hope Works (Pty) Ltd		UnAssigned		10:14:52	Walls require repainting	SM	Scheduled Mainten
() All	E CN0001003	Young Electric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	DR	Select Call Type
- 🖸 Bloemfontein	E CN0001003	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type
New	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num.		Parts Requirement
In Progress	E CN0000996	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental
() Hold	E CN0000998	Apple Juice Inc	24/10/2022			16:38:15	Contract Closure - CO0000054	ADM	Administration
Pending	E CN0000991	Derton / Technologies	13/06/2022	-		09:00:00	Call for Monday elapse hours check	DR	Select Call Type
Complete All	CH0000909	our write rearranges		un mabigi ieu		09:00:00	car for manady elapse hours check	JR	sect car type
	Count: 349								
	4								



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- 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 <u>not</u> 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