

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

SERVICE

CALLS – ASSIGNMENTS

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 [Call Centre Mode](#) notes.

A **Call Assignment** is work that is given to a technician to do. This could be handled differently on the system depending on whether [Tech Connect](#) is used.

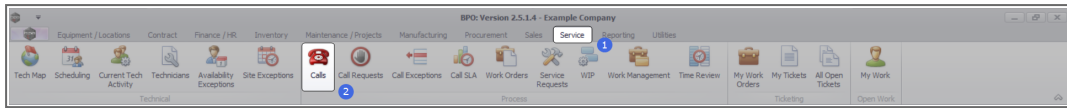
On Tech Connect, the Technician will see the list of assignments and [Accept the Assignment](#) when about to travel to the client. Work and resources can be logged as the technician performs the required job. He may need to [Reject the Assignment](#) if the client is not available or out of his logistical route.

The work can be Accepted on behalf of the Technician using the Force Accept option in the Call Assignments listing, or Rejected on behalf of the Technician.

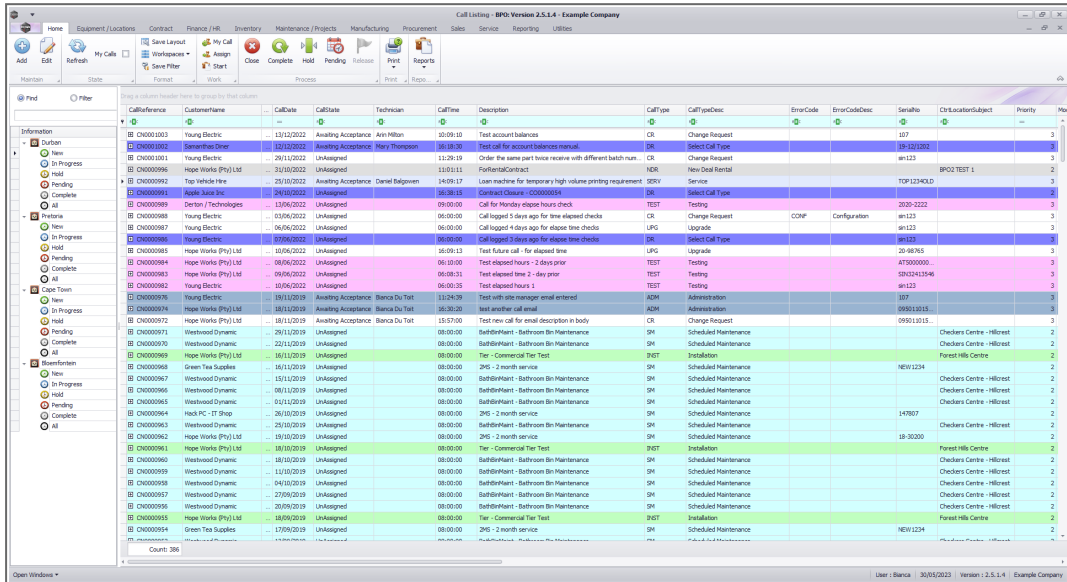
If not using Tech Connect, work assignments are automatically accepted by the system. However, the current assignments can be viewed and additional assignments added. In the case of calls, one assignment is done at a time - with another assignment following a [prior resolution](#).

Ribbon Select **Service > Calls**

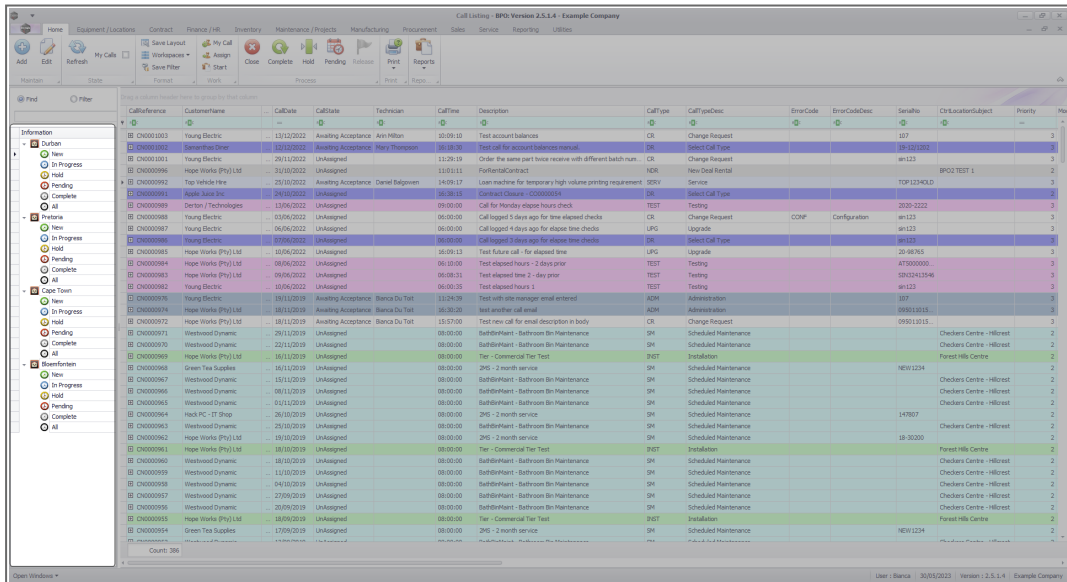
¹BPO2 v2.5.1.3 or higher



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



- 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.



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

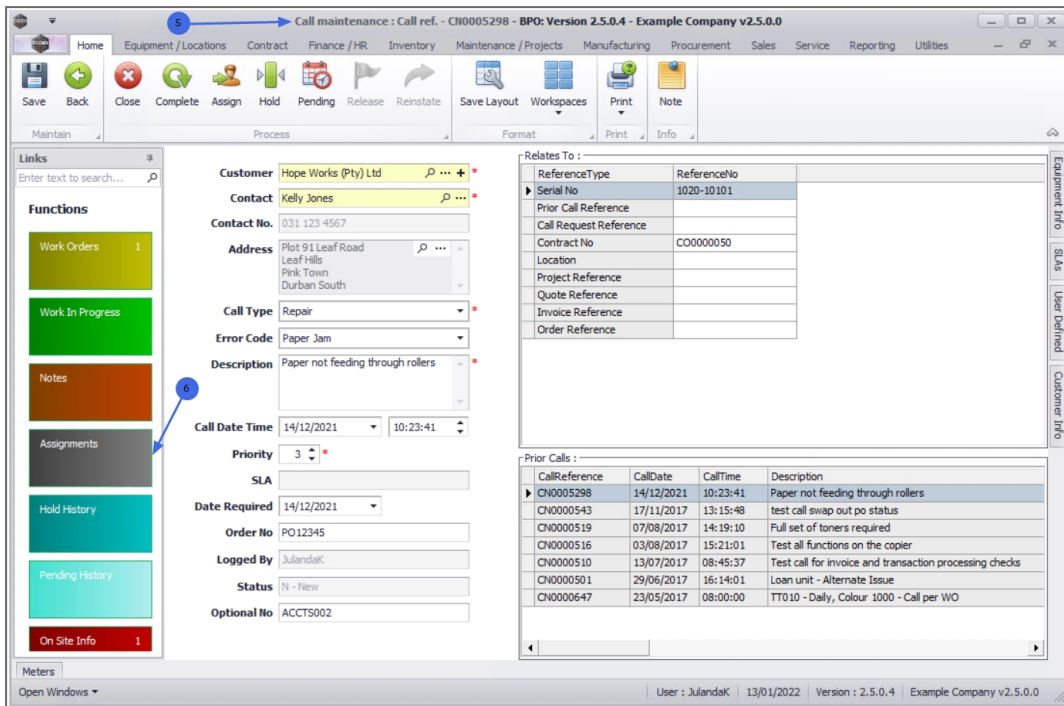
CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrCode	ErrCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH000103	Young Electric	13/12/2022	09:09:10	Ash Milan	Test account balance	CR	Change Request			107		3
BN CH000102	Selwyn's Drive	12/12/2022	06:18:30	Nery Thompson	Test call for account balance manual	CR	Select Call Type			107		3
BN CH000101	Young Electric	20/11/2022	11:29:19		Order the same part twice receive with different batch num.	CR	Change Request			107		3
BN CH000096	Hope Works Pty Ltd	20/10/2022	14:16:11		SubNet/Call/Inst	CR	New Call Request					3
BN CH000092	Top Vehicle Hire	20/10/2022	14:59:17	Daniel Edgewood	Loan machine for temporary high volume printing requirement	SESV	Service				TOP1234567	3
BN CH000091	Adel's Juice Inc	20/10/2022	06:38:15		Contact Closure - C0000054	CR	Select Call Type					3
BN CH000089	Derton / Technologies	13/06/2022	09:00:00		Call for Monthly expense hours check	TEST	Testing			2020-2222		3
BN CH000088	Young Electric	05/06/2022	06:00:00		Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	107		3
BN CH000087	Young Electric	06/06/2022	06:00:00		Call logged 4 days ago for expense time checks	LPG	Upgrade			107		3
BN CH000086	Young Electric	07/06/2022	06:00:00		Call logged 3 days ago for expense time checks	CR	Select Call Type			107		3
BN CH000085	Hope Works Pty Ltd	06/06/2022	06:00:13		Test future call - for elapsed time	LPG	Upgrade			20-8076		3
BN CH000084	Hope Works Pty Ltd	06/06/2022	06:00:00		Test elapsed hours - 2 days prior	TEST	Testing			47300000		3
BN CH000083	Hope Works Pty Ltd	06/06/2022	06:08:31		Test elapsed time 2 - day prior	TEST	Testing			SN1234567		3
BN CH000082	Young Electric	10/06/2022	06:00:00		Test elapsed hours 1	TEST	Testing			107		3
BN CH000078	Young Electric	18/11/2019	11:24:28		Test with message email entered	ADM	Administration			107		3
BN CH000074	Hope Works Pty Ltd	18/11/2019	06:30:20		test another call email	ADM	Administration			09501234		3
BN CH000072	Hope Works Pty Ltd	18/11/2019	15:57:00		Test new call for email description in body	CR	Change Request			09501234		3
BN CH000071	Westwood Dynamic	20/11/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000070	Westwood Dynamic	22/11/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000069	Hope Works Pty Ltd	16/11/2019	08:00:00		Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000068	Green Tea Supplies	16/11/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000067	Westwood Dynamic	15/11/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000066	Westwood Dynamic	08/11/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000065	Westwood Dynamic	02/11/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000064	HOA PC - IT Shop	26/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000063	Westwood Dynamic	21/10/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000062	Hope Works Pty Ltd	19/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000061	Hope Works Pty Ltd	18/10/2019	08:00:00		Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000060	Westwood Dynamic	18/10/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000059	Westwood Dynamic	11/10/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000058	Westwood Dynamic	04/10/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000057	Westwood Dynamic	27/09/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000056	Westwood Dynamic	20/09/2019	08:00:00		SubNet/Call - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN CH000055	Hope Works Pty Ltd	18/09/2019	08:00:00		Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000054	Green Tea Supplies	17/09/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Edit** button.

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

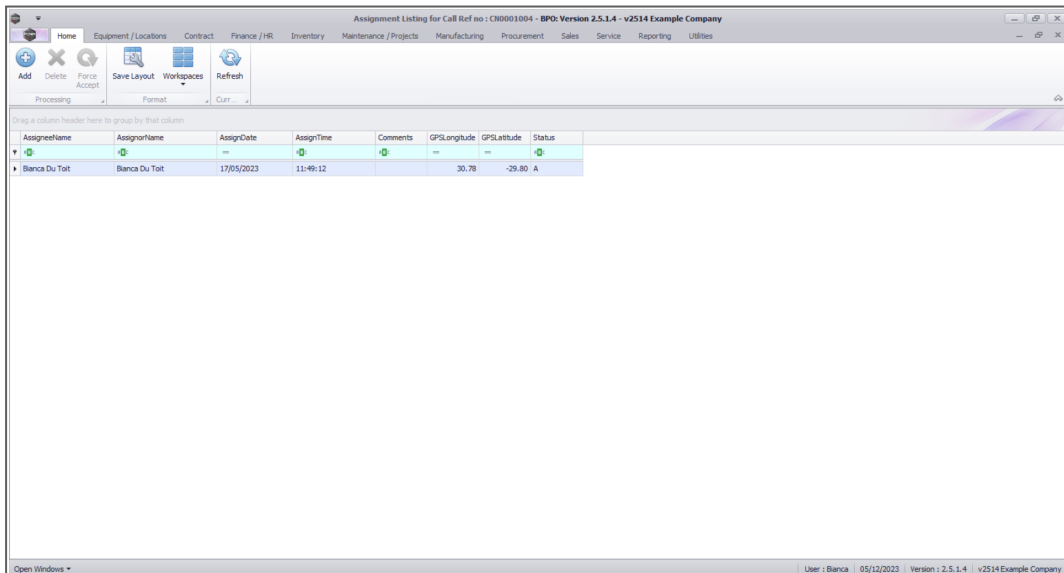
- The **Call maintenance: Call ref. - [call ref. number]** screen will be displayed.

- Click on the **Assignments** tile.



VIEW ASSIGNMENTS

The **Call Assignments** listing displays any call assignments that have been created.

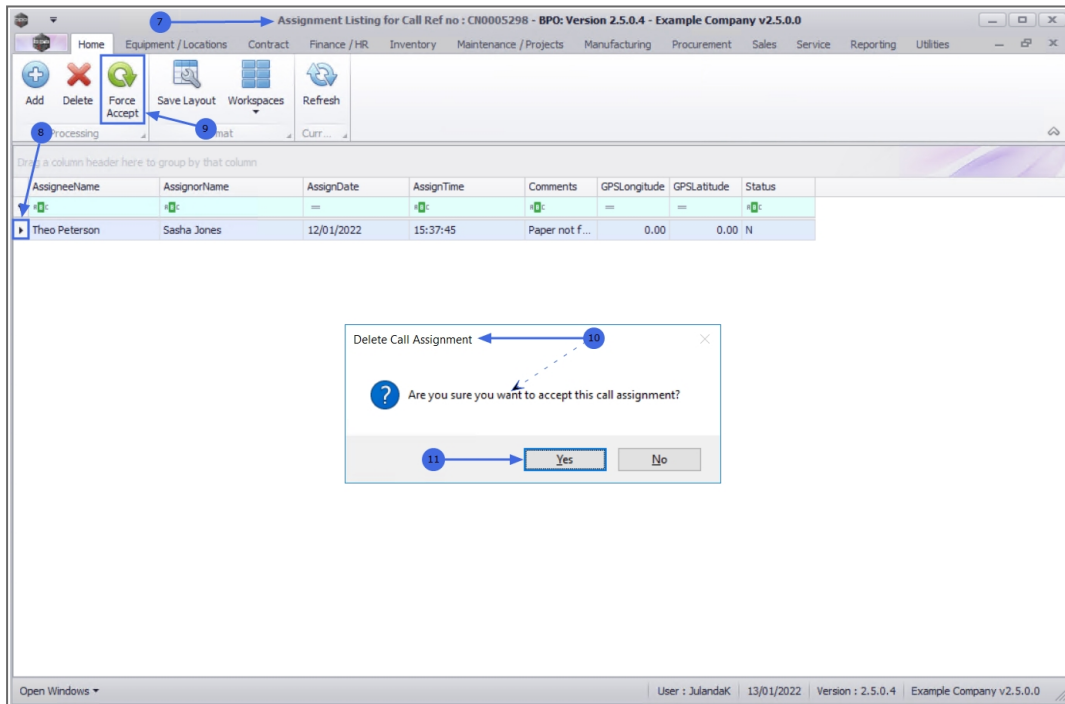


FORCE ACCEPT

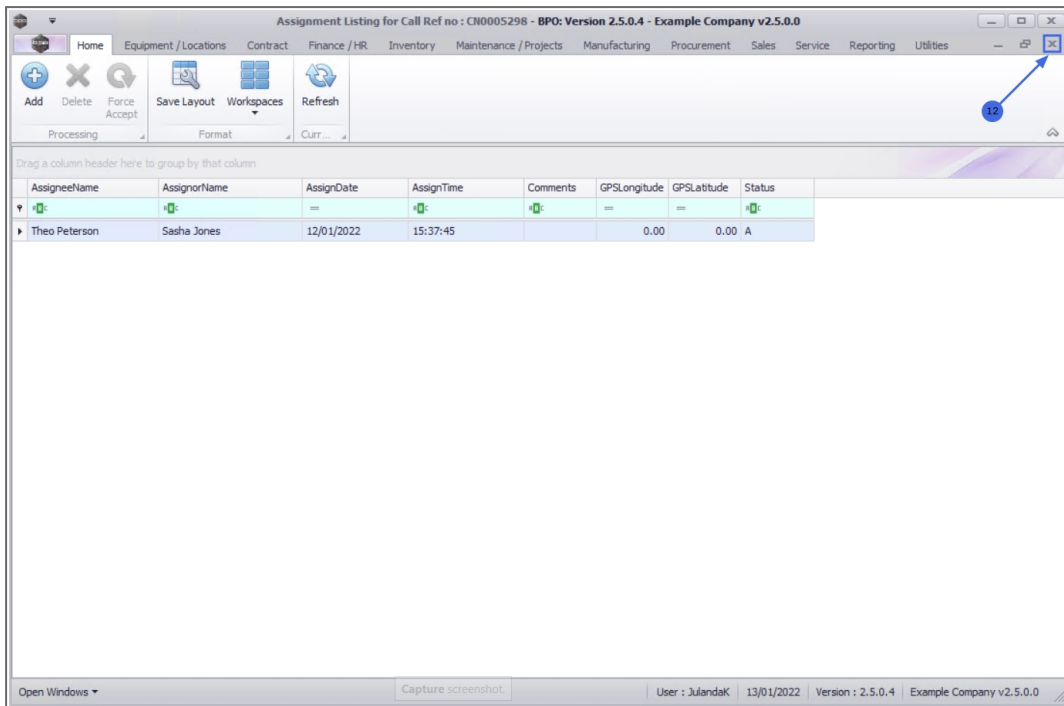
This feature is solely for companies using the Tech Connect Mobile Device System.

If the technician **is** using Tech Connect, he will accept the call on his device. Force Accept is used when the technician, does not accept the call, then call centre will accept the call on his behalf, by issuing a force accept.

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



- Close the **Assignment Listing for Call** screen.



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

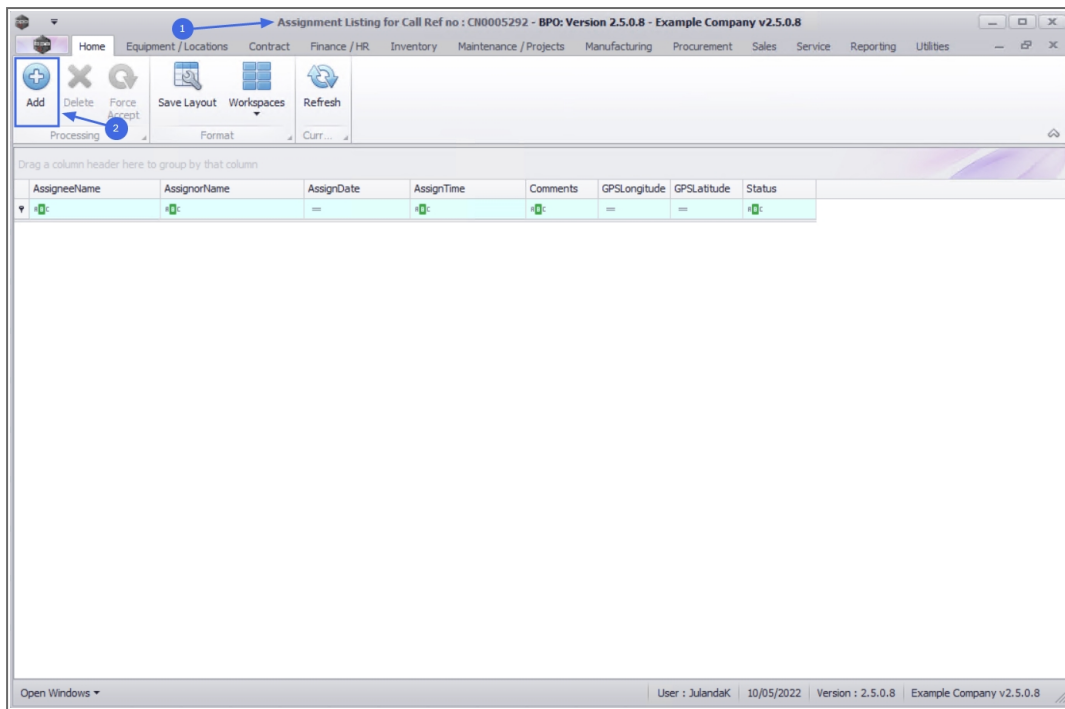


Note that the **Call State** has changed to **Accepted**.

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
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	PROJ406GR002	NDS	New Deal Sale

ASSIGN CALL ASSIGNMENT

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



- The **Call Assignment** maintain screen will come up, with the following fields populated:
 - **Detail:** The Call Description.
 - **Assignment Date and Time:** 2 days from current date and time.
 - **Assigned By:** The employee who is currently logged on.
- Complete the details as follows:
 - **Assigned To:** Select the employee who will be doing this work.
 - **Detail:** This is pre-populated with the call description, but the detail can be added to for further instruction to the technician.

WORK ORDER ASSIGNMENT LINK

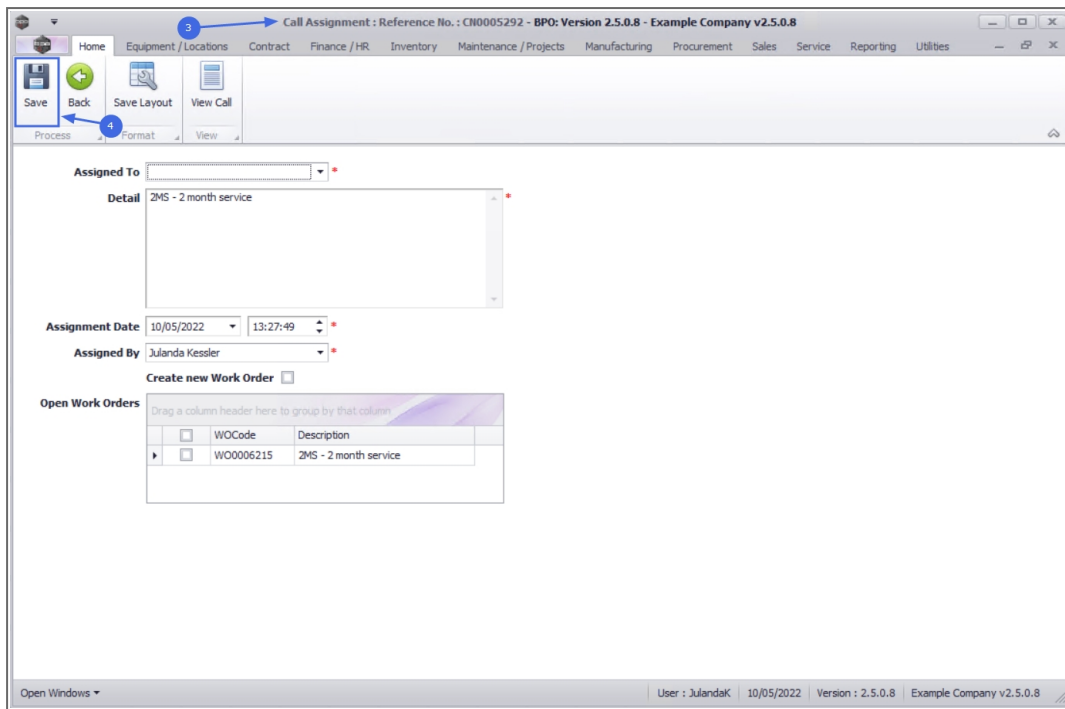
- Next you will select to either link the assignment to the existing open work order or create a new work order. Do not select both flags.

Link to Open Work Order

- For new calls, you will be linking the assignment to the existing **Open Work Order**.
- Click on the check box in front of the relevant **Open Work Order**.

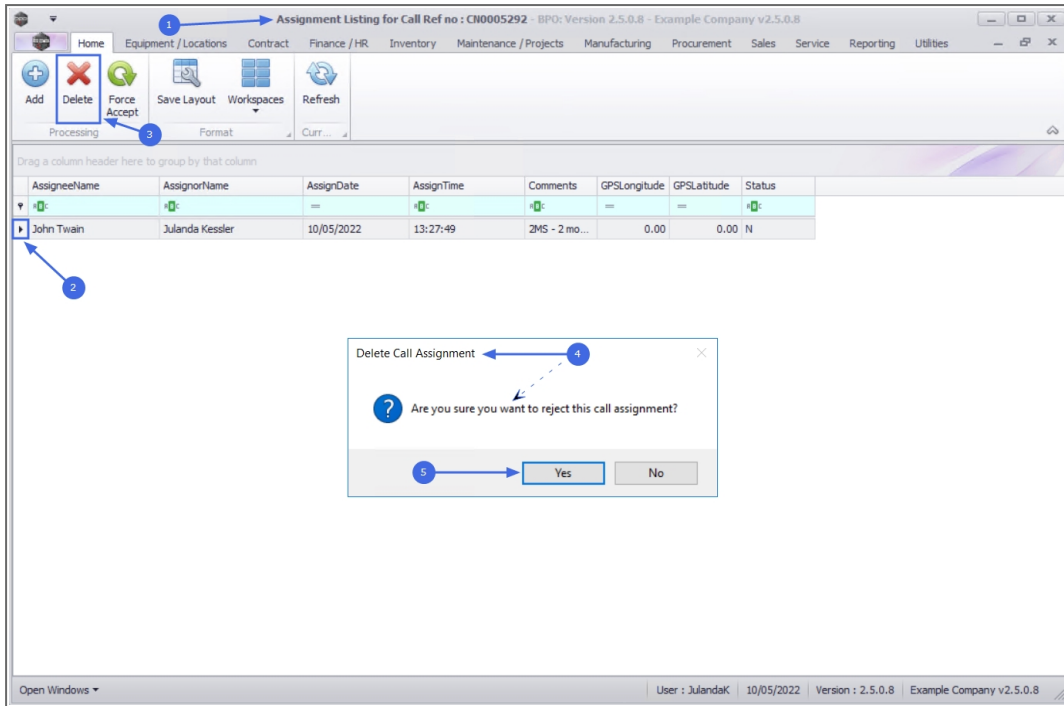
Create New Work Order

- 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.
- Click on the **Create new Work Order** check box.
- Click on the **Save** button.

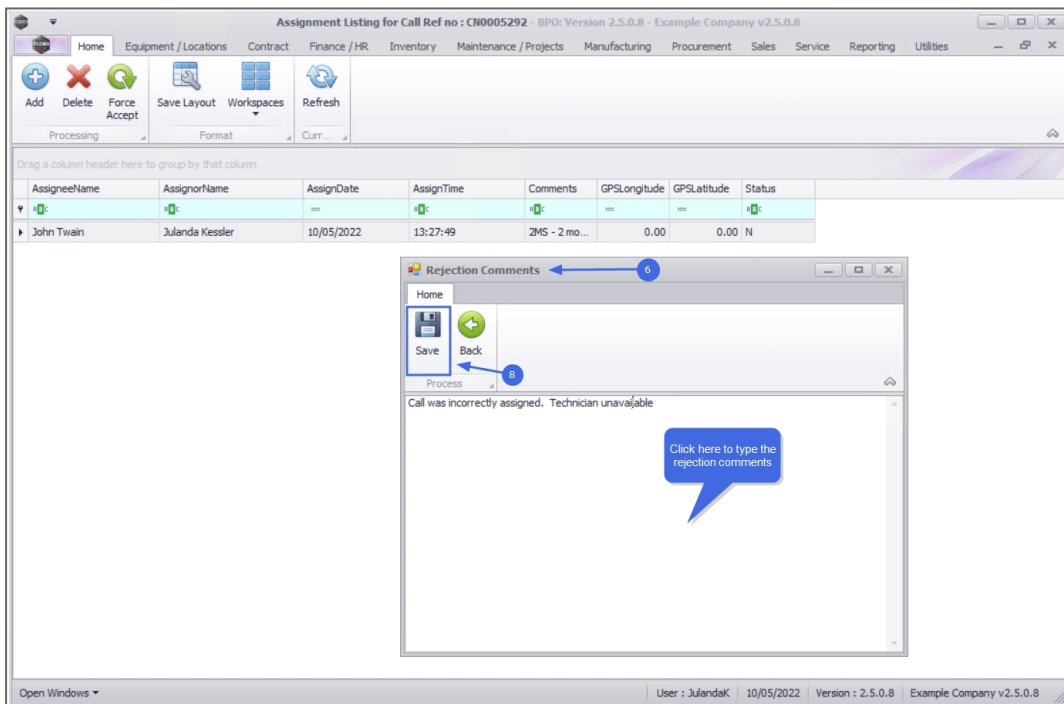


REJECT CALL ASSIGNMENT

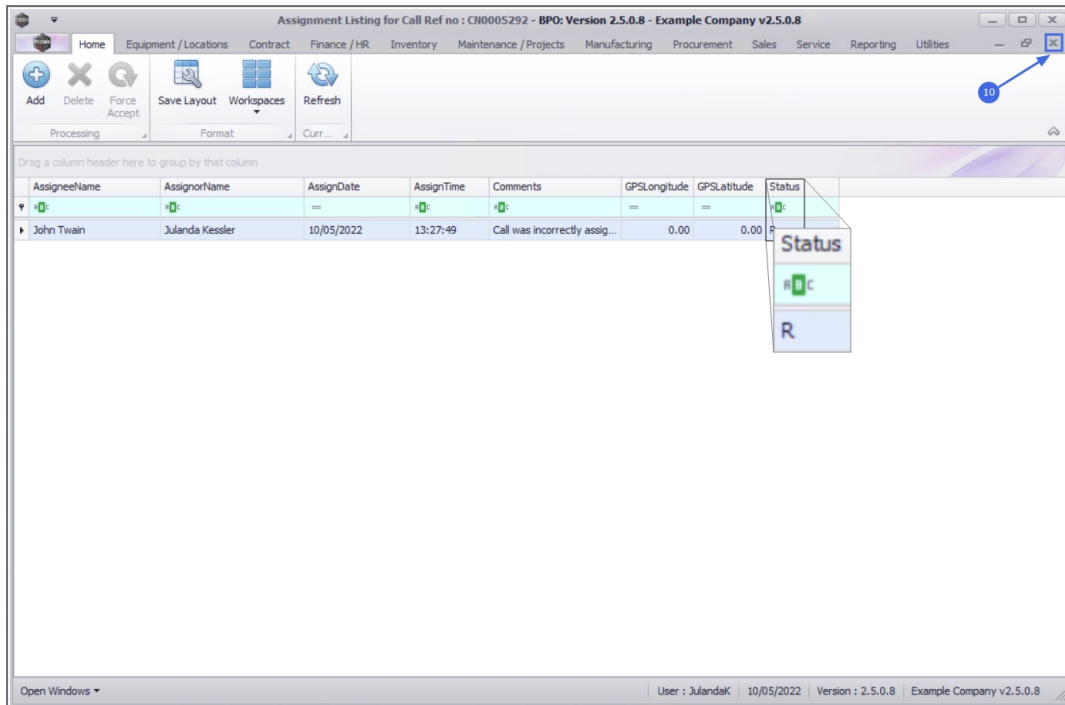
- From the **Assignment Listing for Call Ref no : [call ref number]** screen,
- Click on the **row** of the assignment you wish to remove.
- Click on **Delete**.
- When you receive the **Delete Call Assignment** message to confirm;
 - **Are you sure you want to reject this call assignment?**
- Click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



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



- The Status has been updated to **R** - Rejected.
- **Close** the screen to return to the Call maintenance screen



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